Basic Training Manual

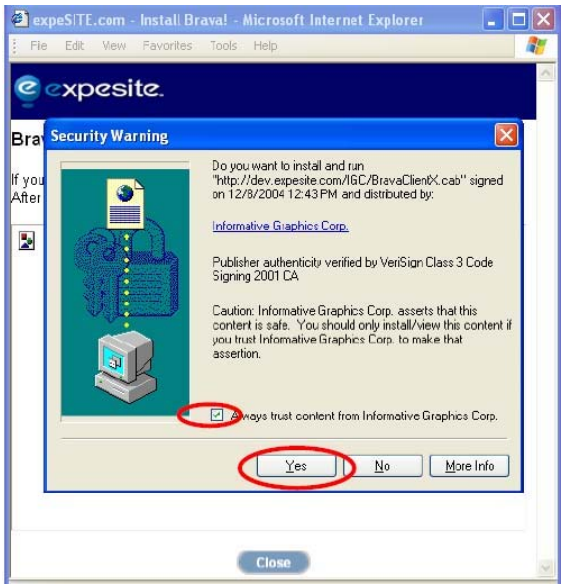
- ***PC Readiness***
- ***Downloading & Uploading***
- ***Tasking***
- ***How To Guides***
- ***Training Workbook***

Logon: www.sheabuild.com

Complete Brava! 5.1 Installation Guide
PC READINESS STEP # 1

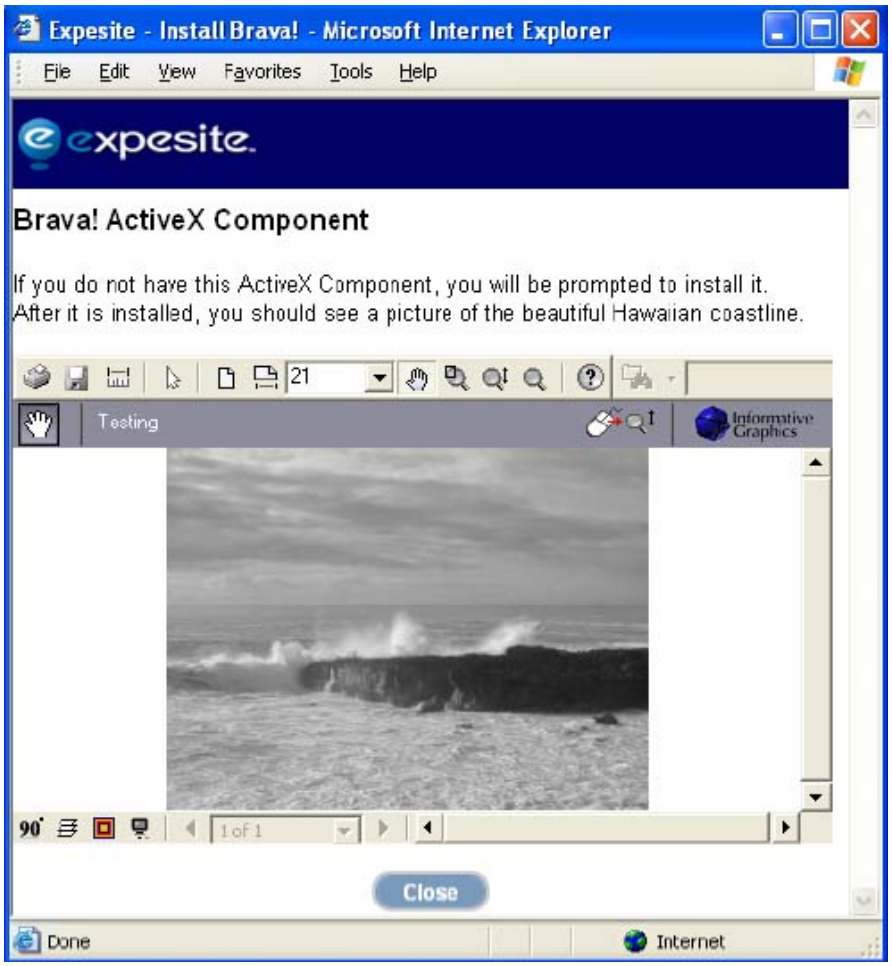
1. Navigate to left of login area of the Shea Build homepage and click on the Brava! Activex Download link below.

2. Check the box below to always trust content from Informative Graphics. (You will not be prompted for updates in the future) Click YES.


expeSITE.com - Install Brava! - Microsoft Internet Explorer
File Edit View Favorites Tools Help
expesite.
Security Warning
Do you want to install and run "http://dev.expesite.com/IGC/BravaClientX.cab" signed on 12/8/2004 12:43 PM and distributed by:
Informative Graphics Corp.
Publisher authenticity verified by VeriSign Class 3 Code Signing 2001 CA
Caution: Informative Graphics Corp. asserts that this content is safe. You should only install/view this content if you trust Informative Graphics Corp. to make that assertion.
Always trust content from Informative Graphics Corp.
Yes
No
More Info
Close

PC READINESS STEP # 1
Continued

3. When the installation is complete, you should see the following picture.


Expesite - Install Brava! - Microsoft Internet Explorer
File Edit View Favorites Tools Help
expesite.
Brava! ActiveX Component
If you do not have this ActiveX Component, you will be prompted to install it.
After it is installed, you should see a picture of the beautiful Hawaiian coastline.
Testing
Informative Graphics
Close
Done
Internet

PC READINESS STEP # 1
Continued

If you are having difficulties with installation here are some trouble shooting tips.

Trouble Shooting

Required Permissions

The Brava! Client is a signed ActiveX control. In order for an end-user to install the client control, their Internet Explorer browser needs to be configured to accept signed ActiveX controls, and must be enabled to run ActiveX controls. Select the "Custom Level..." option from the Internet Explorer Options„³ Security tab to view the various IE security settings.

The end-user must also have the appropriate permissions to download and install the control. By default, most versions of Window's come with the *Standard User* and *Restricted User* roles. A user assigned to a group with the "Standard User" permission set will be able to install the Brava! Client control, however, an end-user with just the "Restricted User" role will not.

To see what type of an account a user has:

1. From the Control Panel, double-click **Users and Passwords** (**User Accounts** in Windows XP).
2. Select the user account and click the **Properties** button.
3. In the Properties dialog, select the **Group Membership** tab for the user's group.

To allow an end-user to install the Brava Client ActiveX control, a couple of alternatives are:

- Set the end-user's Group Membership to one that has the appropriate rights (i.e. the Power User's Group). This is set from the **Group Membership** panel described in the preceding paragraph.

- A user with sufficient rights can install the control on the restricted user's machine. This can be accomplished by copying over the entire ClientInstallScript directory (located under the Brava! Client install directory) to the end-user's machine and then running the BravaClientInstall.bat script located in the copied directory. Once executed, an end-user who only has "Restricted User" rights will be able to execute the Brava! Client control. See the README.txt file in the ClientInstallScript directory for more information.

- A user with appropriate rights can log on to the end user's machine and hit a sample page that references the Brava! Client control. Once this has been successfully downloaded by this "power" user, the restricted user will be able to use the Brava! control on the machine.

Please contact support@expesite.com if you encounter other difficulties

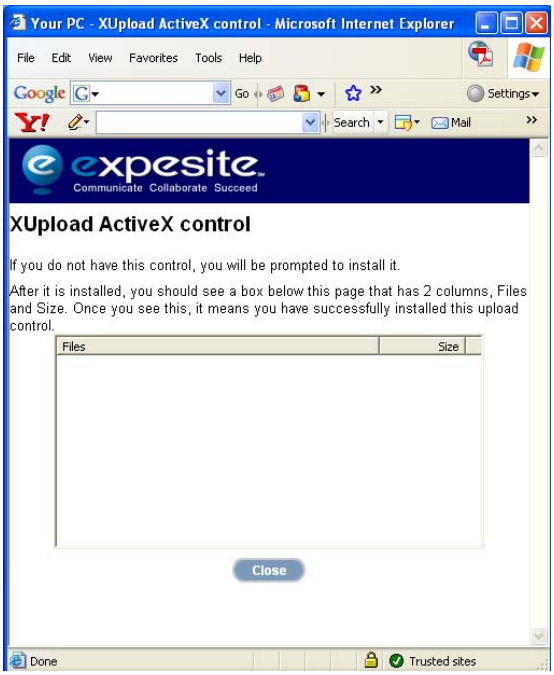
XUpload Installation Guide
PC READINESS STEP # 2

1. You may need to download the Xupload ActiveX component needed to upload/download.

   To do this, navigate to http://www.sheabuild.com, but do not login.

2. Navigate to left of login area of the Shea Build homepage and click on XUPLOAD ACTIVEX-Download

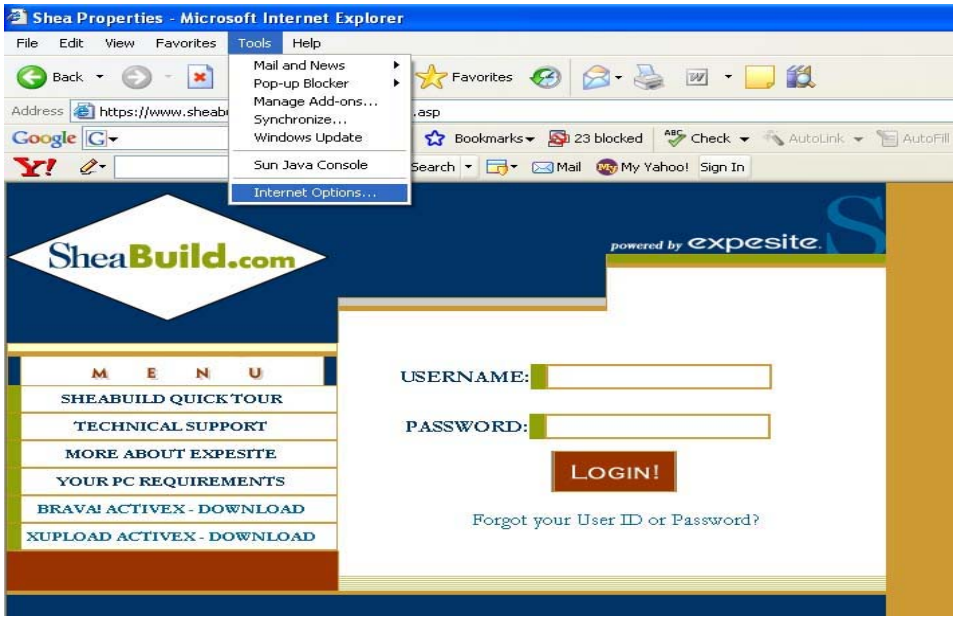
3. You should receive a popup asking you to install the upload ActiveX control and once it has completed, you should see the box below showing the words “files and size” along the small bar.


Your PC - XUpload ActiveX control - Microsoft Internet Explorer
File Edit View Favorites Tools Help
expesite
Communicate Collaborate Succeed
XUpload ActiveX control
If you do not have this control, you will be prompted to install it.
After it is installed, you should see a box below this page that has 2 columns, Files and Size. Once you see this, it means you have successfully installed this upload control.
Files
Size
Close
Done
Trusted sites

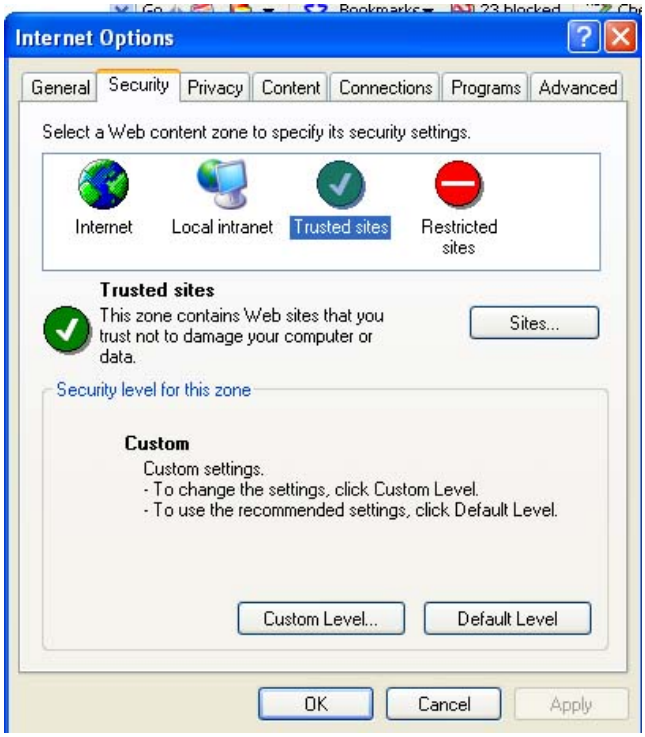
If you are not able to see this box, please contact Expesite Support at (614) 324-5773.

INTERNET EXPLORER—ADDING A TRUSTED SITE
PC READINESS STEPS # 3

1. At the top of Internet Explorer, click on Tools and then Inter net Options



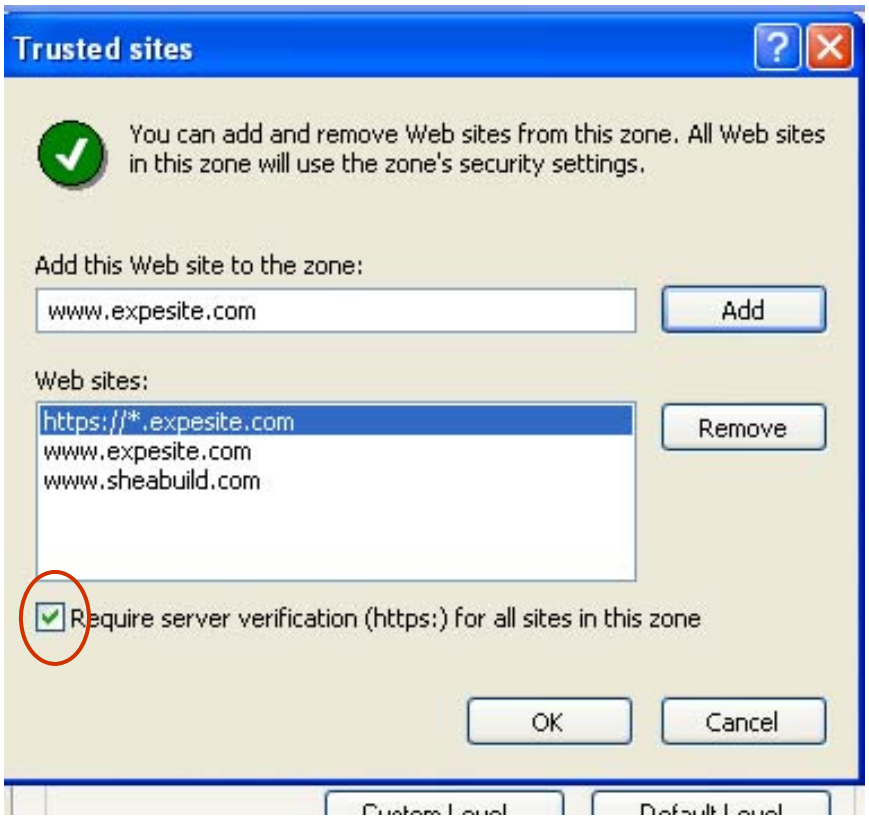
2. You will get the screen below, click on the Security Tab next to General Tab then highlight "Trusted Site"…..



PC READINESS STEPS # 3
Continued

3. Add our website to the “add this website to the zone” and then remove the check next to “Require server verification (https:) for all sites in this zone” and then click on add and our website will drop down in the “Web Sites” box.

** Please add: https://*.expesite.com & https://*.sheabuild.com



4. Click “ok” twice to exit out of the screens and then restart Internet Explorer for the changes to take effect. Once this is done, you should be able to install the software.

PLEASE CHECK WITH YOUR IT DEPARTMENT
BEFORE CHANGING POP-UP BLOCKER SETTINGS
PC READINESS STEP # 4

In addition to adding Expesite and SheaBuild as Trusted Sites, you may wish to configure your Pop-Up Blocker in your Windows Explorer.

Please see how to locate below:

In addition, make sure to type the site addresses and click ADD if there not already listed.

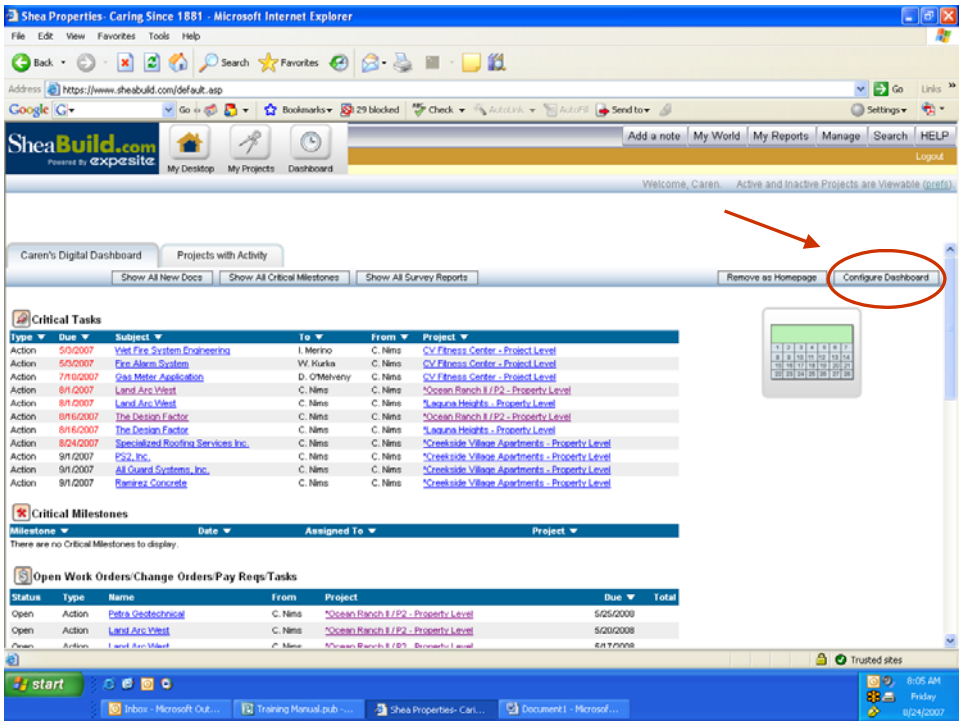
Pop-up Blocker Settings
Exceptions
Pop-ups are currently blocked. You can allow pop-ups from specific Web sites by adding the site to the list below.
Address of Web site to allow:
http://sheabuild.com/
Add
Allowed sites:
www.expesite.com
Remove
Remove All
Notifications and Filter Level
Play a sound when a pop-up is blocked.
Show Information Bar when a pop-up is blocked.
Filter Level:
Medium: Block most automatic pop-ups
Pop-up Blocker FAQ
Close

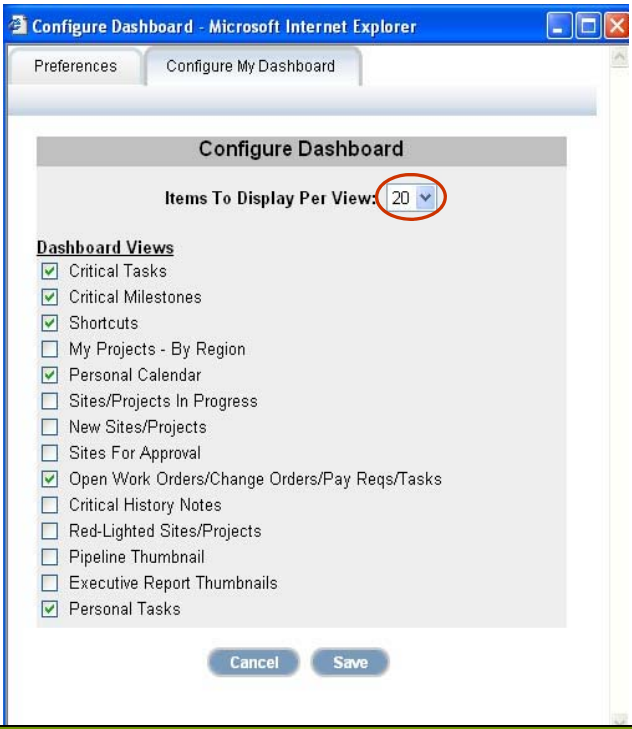
You may have other tool bars on your Window's Explorer—so make sure they are also configured to allow pop-ups.

CONFIGURING YOUR DIGITAL DASHBOARD & SETTING YOUR PERSONAL PREFERENCES

After you login to SheaBuild.com for the first time we recommend that you configure your digital dashboard and set your personal preferences.
This will make SheaBuild work more effectively for you!

1.) Click on Configure



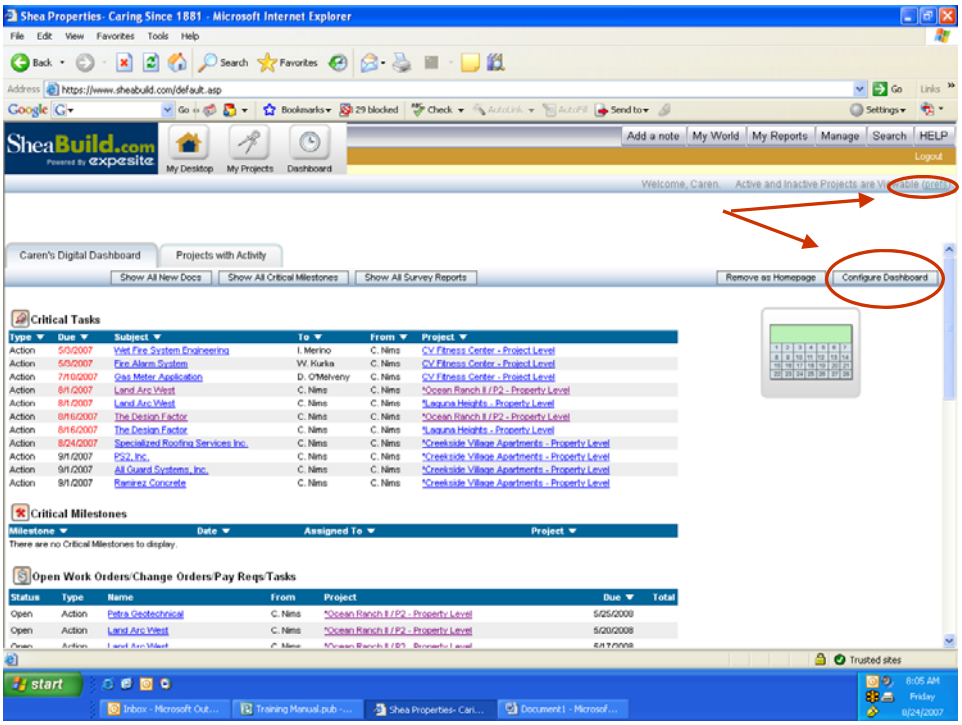


- We recommend changing Items to Display Per View to 20.
- If you want some of the other options to show on your Dashboard go ahead and ☑ check them as well!

Click Save and Close

CONFIGURING YOUR DIGITAL DASHBOARD & SETTING YOUR PERSONAL PREFERENCES

To set your Personal Preferences click on Configure Dashboard and then click on Preferences. Or click on (prefs) right above Configure Dashboard.



Preferences - Microsoft Internet Explorer
Preferences
Configure My Dashboard
Every time I logon, go to:
Digital Dashboard / New Activity
Send e-mail to me in this format:
HTML (contains images)
Auto-Notification of Critical Dates:
Do Not Send Auto-Notifications
Define Critical
Other Preferences:
Hide Inactive Projects
View Each Document in a New Window
Start with collapsed folders in the Documents area.
Subscriptions:
Edit Subscriptions
Automatically subscribe to new projects
Do not automatically subscribe to new projects
Show only subscribed projects in 'My Projects'
Send e-mail notifications to me from the:
System's email address
Language Preferences:
English in U.S.
Cancel
Save

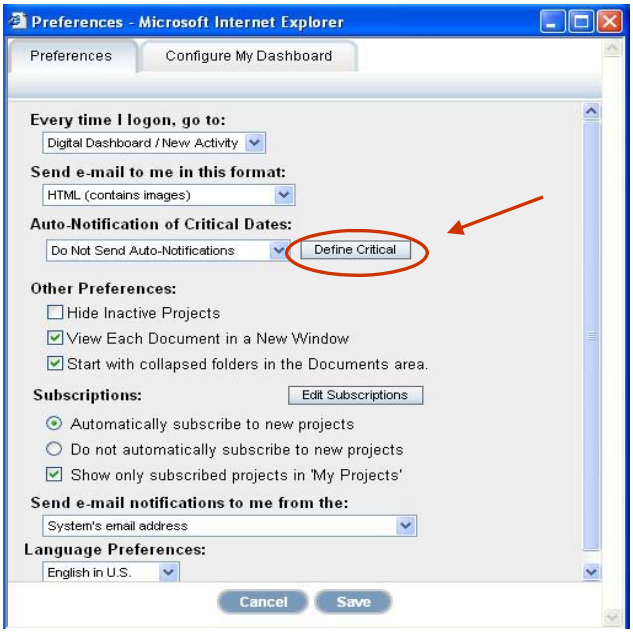
- Besides the system defaults we recommend that you
  ☑ check “View Each Document in a New Window”
- Also, ☑ check “Start with collapsed folders in the Documents area”

Next we will Define Critical

Continued on next page...

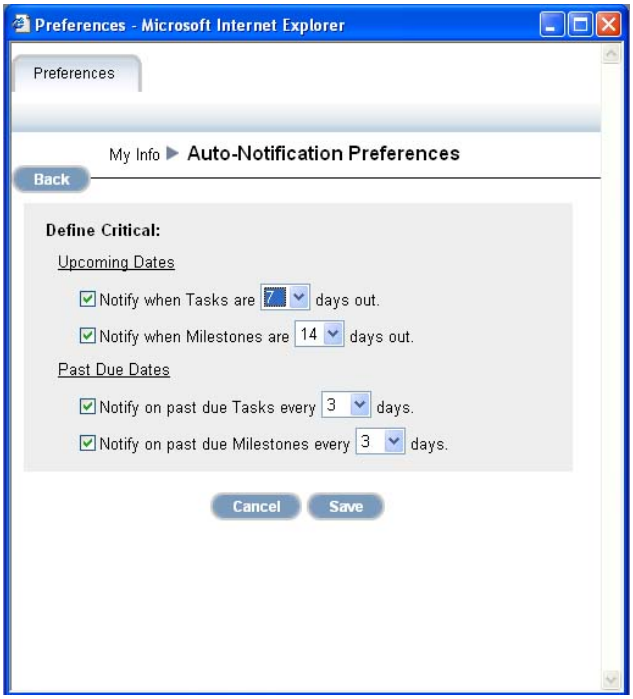
CONFIGURING YOUR DIGITAL DASHBOARD & SETTING YOUR PERSONAL PREFERENCES

Now click on Define Critical.


Preferences - Microsoft Internet Explorer
Preferences
Configure My Dashboard
Every time I logon, go to:
Digital Dashboard / New Activity
Send e-mail to me in this format:
HTML (contains images)
Auto-Notification of Critical Dates:
Do Not Send Auto-Notifications
Define Critical
Other Preferences:
Hide Inactive Projects
View Each Document in a New Window
Start with collapsed folders in the Documents area.
Subscriptions:
Edit Subscriptions
Automatically subscribe to new projects
Do not automatically subscribe to new projects
Show only subscribed projects in 'My Projects'
Send e-mail notifications to me from the:
System's email address
Language Preferences:
English in U.S.
Cancel
Save

This is strictly your personal preference.

- When do you want to be notified when Tasks are due? In this example you will be notified 7 days prior to the Task being due.
- When do you want to be notified when Milestones are due? In this example you will be notified 14 days prior to the Milestone being due.
- How often do you want to be notified when a Task is past due?
- How often do you want to be notified when a Milestone is past due?



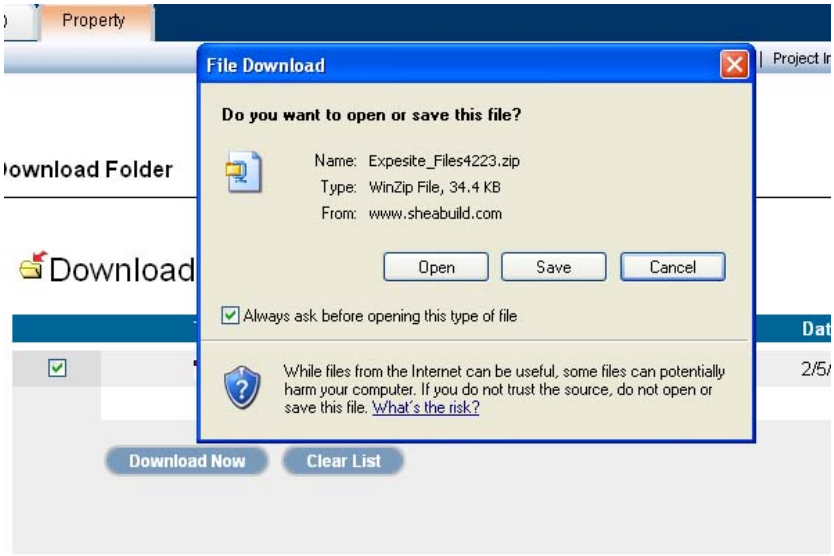
Choose the settings that are right for you and Click Save and Close!

Documents — Downloading Files

1. Click on “My Projects” and choose the project you wish to download files from.
2. Click on the “Documents” link to the upper right
3. Click on the folder that contains the document you wish to download.
4. Place a check mark next to the file(s) you wish to download.
5. Click on the “Download” button.

Title
Markups
Posted By
Date
Size
Version
Select All
5-10-15 RP Census Demo Overview 2005 data 4-27-05.pdf [view in Acrobat] Caren Nims 2/5/2007 89
5-10-15 RP Daytime Employment 4-27-05.pdf [view in Acrobat] Caren Nims 2/5/2007 66
Claritas demographics 2.pdf [view in Acrobat] Caren Nims 2/5/2007 92
Claritas demographics.pdf [view in Acrobat] Caren Nims 2/5/2007 6,565
Copy of RiverPark - So Cal Comparative Demos.xls Caren Nims 2/5/2007 60
Full Report.pdf [view in Acrobat] Caren Nims 2/5/2007 1,131
Notify Team
Copy
Download
Move
Delete

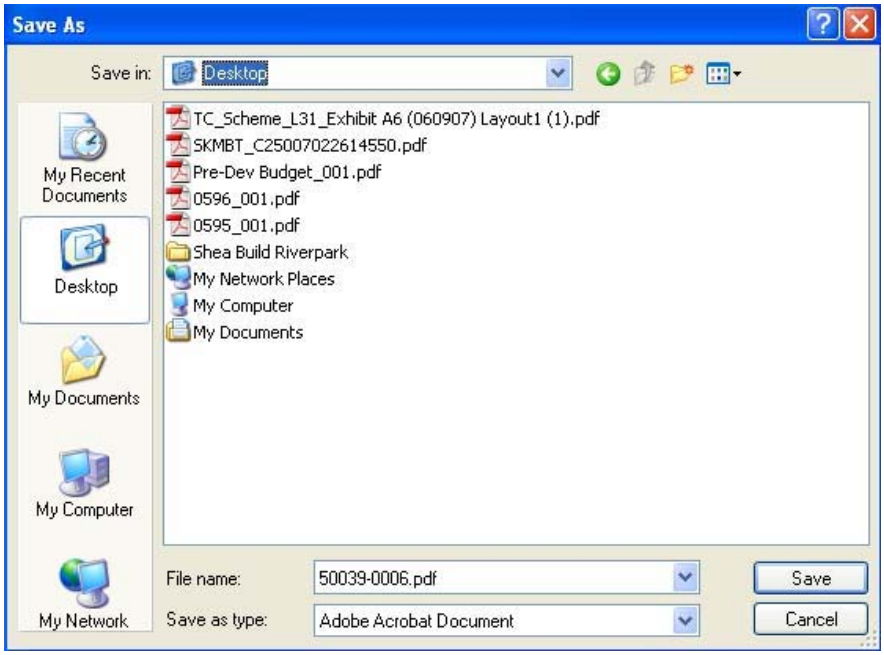
6. You will then be taken to the “download” folder.
7. Click on the “Download Now” button.


Property
File Download
Do you want to open or save this file?
Name: Expesite_Files4223.zip
Type: WinZip File, 34.4 KB
From: www.sheabuild.com
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?
Download Now
Clear List

8. You will then receive a prompt asking you if you would like to open or save the file.
9. Click Save.

Documents — Downloading Files

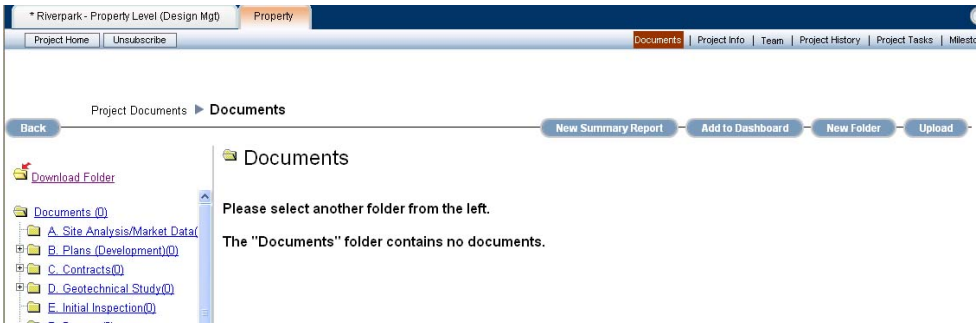
You will then be prompted on a location for your file. Choose where you would like to save the file(s) and then click save.



If you are unable to download files you may need to have XUpload installed on your PC. This is an Active X Control that can be downloaded and installed directly from www.exepsite.com

Documents — Uploading into SheaBuild

1. Prior to uploading documents, the first thing you must be certain of is that you have the ability to upload. To check this, you log into sheabuild.com, choose a project, and then click on “documents”. (see screen shoot below) You will see a split screen showing the documents folders on the left and the actual folder you selected on the right.



2. Once you select the folder (in this example I selected “Site Plans”.) You will see the actual folder selected on the right hand side. (B.03—Site Plans) At this point, if you have the ability to perform uploads; you will see the button “Upload” between “New Folder” and “Delete Folder”. If you do not see the “Upload” button, then you do not have the ability to upload into this particular folder and you will need to contact the project manager to have them give you access.

Documents — Uploading into SheaBuild

3. If you do have the “Upload button”, once you click on it, you will see the screen below. Click on the “Select button”…….

4. You will get the screen below that will allow you to locate the file directly from your computer.

Recommendations for Posting Documents for Online Viewing/Redlining

Expesite incorporates a viewing application, Brava! (created by Informative Graphics Corp), to enable users to view and redline many document types online. While every effort will be made to enable viewing and redlining of all posted documents, some limitations may prevent online viewing. Please use the recommendations below to ensure online viewing and redlining of your files. These recommendations apply only to files posted for online viewing and redlining and not to files posted for exchange/distribution.

Size Recommendations We recommend not posting files over 2MB (2,000K) in size for viewing/redlining. Files over this size may take longer to view, redline and download and in some cases may not be viewable online.

Image Files We recommend posting images as JPGs if at all possible as they are typically smaller and more compressed than other images types but still retain quality. This is the default file type from most digital cameras.

Drawing Files The following are recommended methods for posting drawing files:

- ☒ DWF (Drawing Web Format) Very small files well suited for the web, however True Type Fonts will be substituted.
- ☒ PLT created with standard HP Driver (HP750C)PLT files generated with a different driver may not view correctly
- ☒ DWG/DGN (bind X-REFs or Merge into Master before posting)If X-REFs are not bound, they will not display in the drawing
- ☒ PDF

Please Note: Because of the many variations possible in drawing files and plot files, some configurations may prevent a document from being viewed with Brava!

Non-Standard Fonts

If expesite does not have a specific font in its system, this font will be replaced with another similar font when the document is viewed. If this replacement is not acceptable, send your non-standard fonts to expesite support (support@expesite.com) to be incorporated into the viewing system.

Supported File Types / Extensions

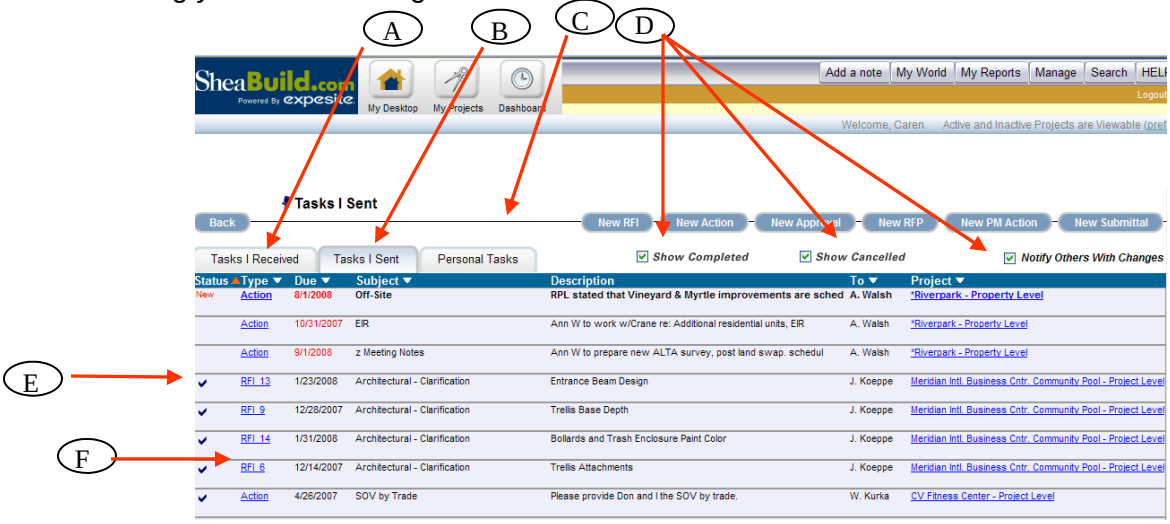
Drawings	Images	Spreadsheets	Office Docs	Other Types
.plt	.bmp	.xls	.doc	.pdf
.cal	.jpg	.xlt	.dot	.txt
.dgn	.tif	.rtf		
.dsn	.gif	.ppt		
.dwg	.cgm	.pps		
.dwf	.mpp			
.dxf	.mpt			
.edc				
.edm				
.cmi				

New File Types If you have a file type that is not on the Supported File Types list (above), please contact support@expesite.com. We will attempt to configure our servers to view any new file types requested; however, viewing may not be possible in some cases.

TASKING FOR THE EXTERNAL USER

For External User's to access the tasking area they will first need to click on My World and then My Tasks.

This will bring you to the tasking area.



A. **Tasks I Received**
View all tasks that I have received

B. **Task I Sent**
View all tasks that I have sent

C. **Personal Tasks**
Personal Tasks can be thought of as a personal 'To Do List'. Personal Tasks are non specific and can not be seen by any other system users. Your critical Personal tasks will be included in your Daily notification of Critical dates and can also be added to your Digital Dashboard via the Configure Dashboard button, located in the right corner of the Digital Dashboard screen.

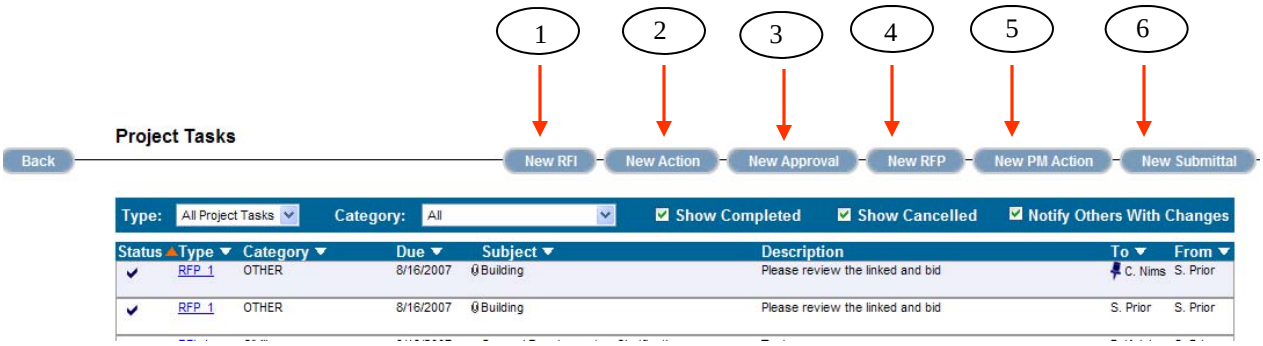
D. **Show Completed / Cancelled Tasks**
Select to show or hide completed and cancelled tasks by checking or unchecking the boxes.

Notify Others With Changes
When you Select "Notify Others With Changes" it gives you the option to notify others when you have updated, added a new attachment or completed the task.

E. **Priority / Status**
This shows the priority of your tasks (low/high) and the status (new, completed, declined, cancelled). Use the key at the top of the page to determine the priority or status. If a task has no icon next to it, it's an open task of normal priority. Tasks will stay in the New status until the recipient has accepted or declined the task.

F. **Task Type**
Click on the Task Type (RFI or Action) to open the task detail and view additional information.

TASKING FOR THE EXTERNAL USER



1. **New RFI—Request for Information**
   Use this task to make a formal request for information, primarily during bidding and construction. New RFI's can be sent to one person on one specific project at a time.

2. **New Action**
   Use this task as a general request for something to be done such as a design change, meeting request, etc. Action tasks can be sent to one person across multiple projects.

3. **New Approval**
   Use this task to request approval for a Design Document, Construction Document, Material/ Color Selection, Payment, Schedule Issue, etc. Approval tasks can be sent to multiple people on one specific project at a time.

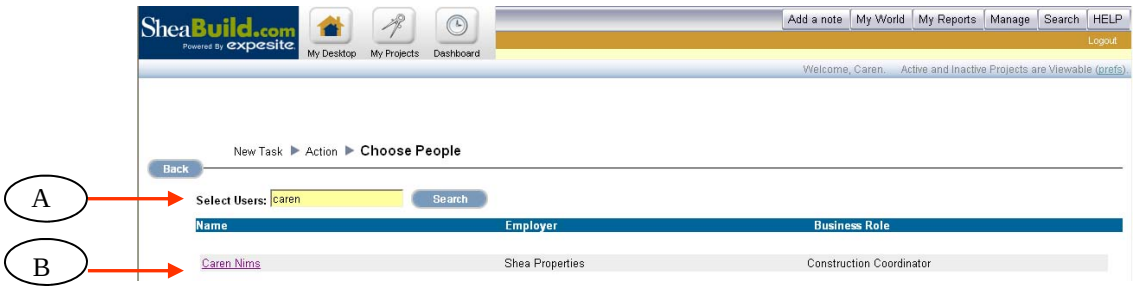
4. **New RFP—Request for Proposal**
   Use this task for Professional Services, Design Changes, Change Orders, etc. RFP tasks can be sent to multiple people on one specific project at a time. RFP tasks can also be sent to SheaBuild users who are not on the project.

5. **New PM Action**
   Use this task to send a general request to the user set as PM in the Standard Project Information area. This task is identical to an Action Task other than it's automatic assignment to the PM role.

6. **New Submittal**
   Use this task to log Material Samples, Color Samples, Shop Drawings, or Product Literature. New Submittals can be sent to one person on one specific project at a time.

TASKING FOR THE EXTERNAL USER

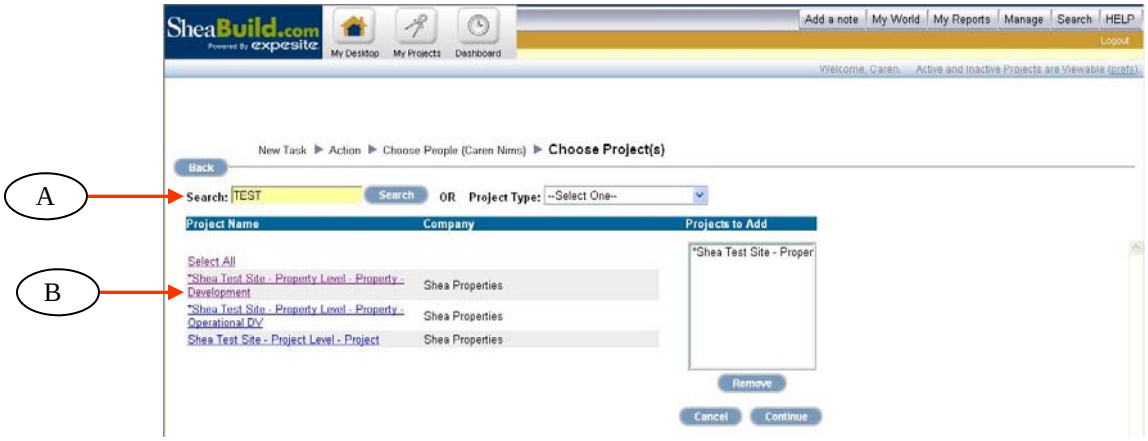
SEND A NEW TASK—CHOOSE PEOPLE



A. **Search for User**
Type search criteria and then click Search to bring up a list of people below. (Note: Don't be too specific when entering search criteria. A first name is enough information)

B. **User Name**
Click on user's name to choose the person to be the recipient of your task. If you are sending an Approval or RFP task, you will have the opportunity to select multiple users to send your task to. Clicking on the user's name will put them in a box on the right side of the screen; click continue when your recipient list is complete.

SEND A NEW TASK—CHOOSE PROJECTS

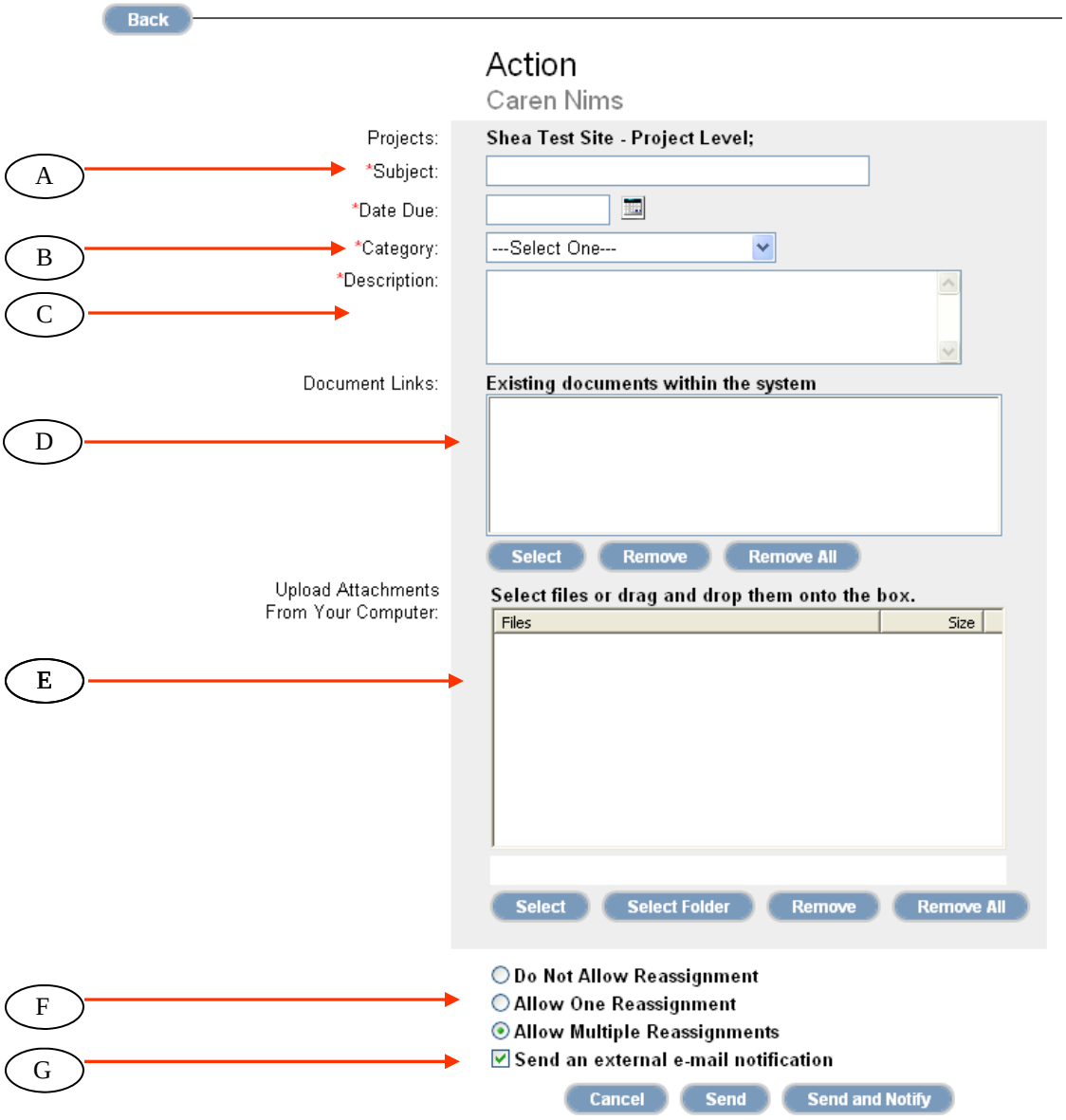


A. **Search for Project**
Type search criteria and then click Search to bring up a list of projects below. You can also search for projects using the Project Type filter to the right of the search field.

B. **Project Name**
Click on the project name to choose this project. If you are sending an Action task, you will have the opportunity to select multiple projects to send your task for. Clicking on the project name will put it in a box on the right side of the screen; click continue when your project list is complete.

*** If you select multiple users or projects to create a task for, a separate task will be created for each user or project selected.

TASKING FOR THE EXTERNAL USER
SEND A NEW TASK—ENTER TASK INFORMATION



A. **Tasks Fields**
Fill in the task information (* denotes a required field).

B. **Category**
Update the task category. You can then filter by the task category in the project tasks area or when creating a report.

C. **Description**
This is where you would outline what you want done for the person you are sending the task to.

Continued on next page

TASKING FOR THE EXTERNAL USER
SEND A NEW TASK—ENTER TASK INFORMATION

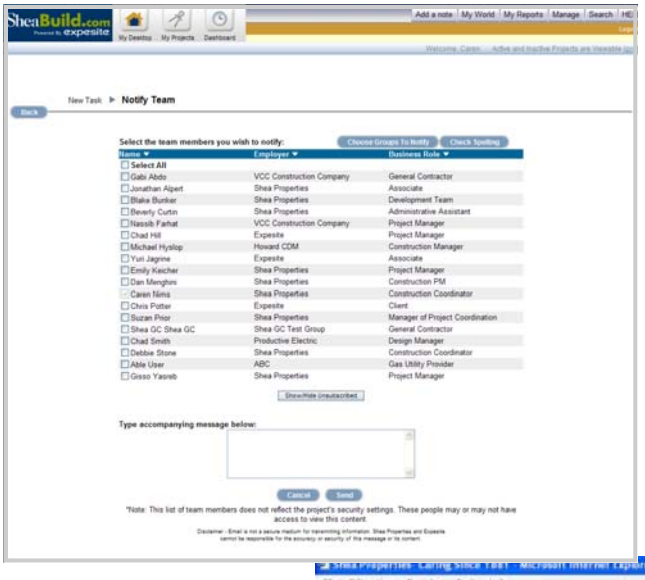
D. **Document Links**
Add links to documents that are currently posted to a folder under the Document Tab for this Project. Clicking Select will bring up the folder structure, click on the folder name to view all documents within and click document name to create link.

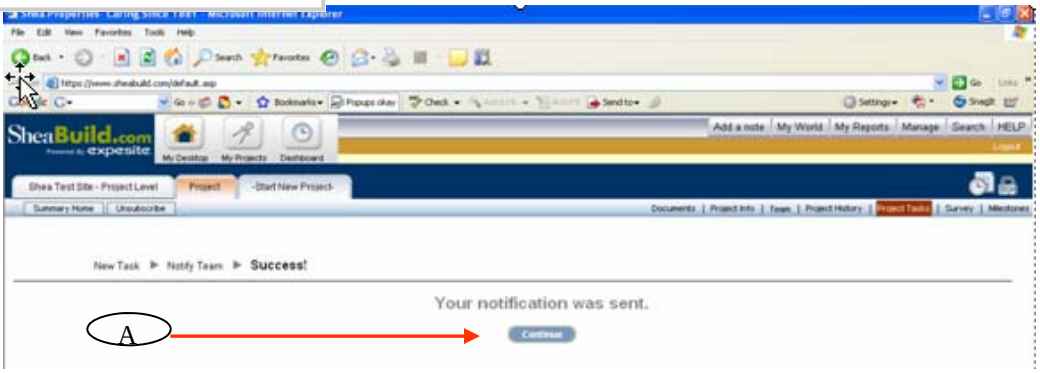
E. **Attachments**
Attach documents from your computer to provide additional information. Click Select to search for a document to upload from your computer or network. You can also drag and drop documents onto the file list (from your computer, not from the select box).

F. **Allow Reassignment**
By default tasks will be set to Allow Multiple Reassignments. You can choose to limit or not allow reassignments by clicking the radio button to the left of your choice. As the sender, you will always be notified if the task is reassigned by the recipient.

G. **Send an External E-mail Notification**
Check this box to notify the recipient via E-mail that you have sent them a task.

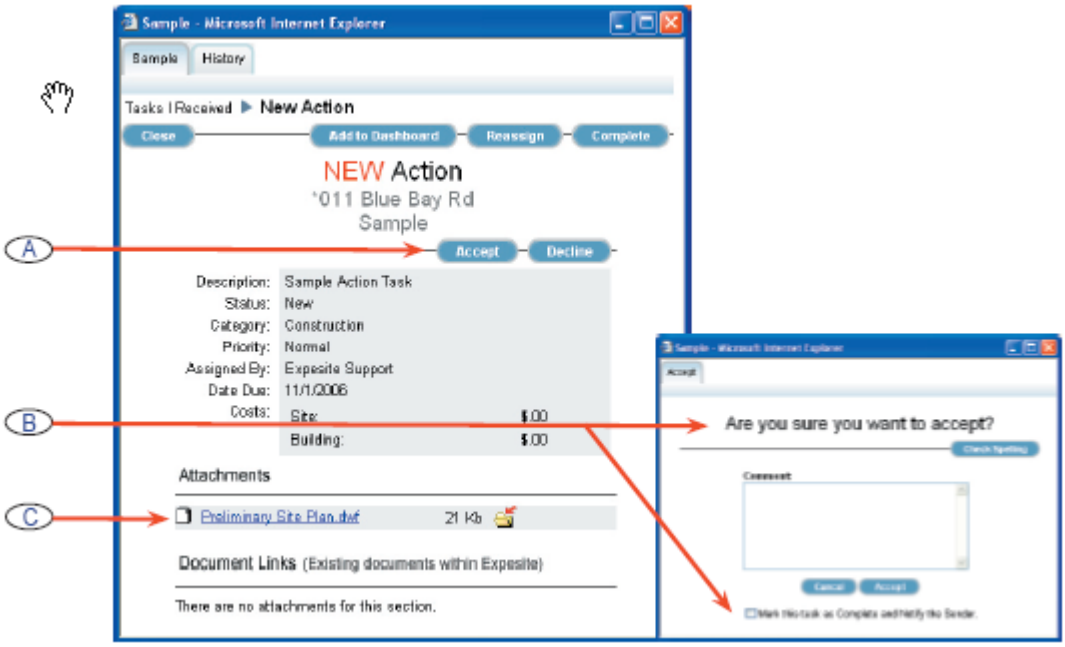
Click on Send if you only want to Send to the person assigned the task person. Click on Send and Notify if you want to notify that person and others. (See previous page for picture) If you click on Send and Notify the Notify Team screen will appear and you may select other people to notify of the task .





A. You will be taken to the screen below when your task has been sent. Click continue to be taken back to the page you created your task from.

TASKING FOR THE EXTERNAL USER
RECEIVING A NEW TASK—ACCEPT OR DECLINE



A. **Accept**
Click Accept to accept responsibility for completing the task, this will change the task from a New status to an Open status. This does not complete the task, the purpose of accepting is for the Recipient to let the sender know they have reviewed the task and will complete it by the requested due date.

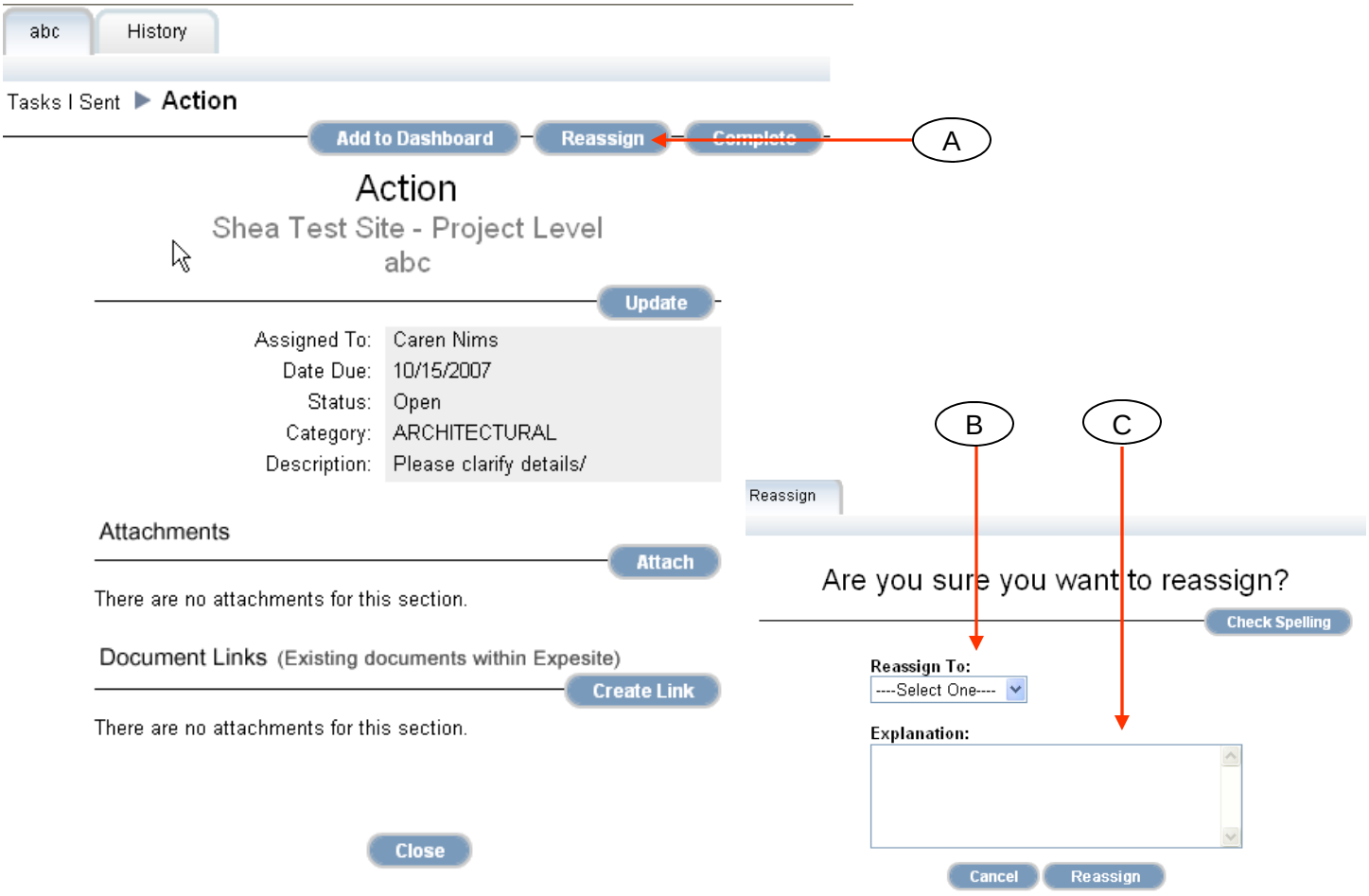
Decline
Click Decline to let the sender know you will not be accepting responsibility for completing this task. Some reasons for declining a task: insufficient information, unreasonable due date, or incorrect assignment. When a task is declined, the sender will have the ability to easily update the task or forward to another party.

B. **Accept/Decline Comments**
Accepting or Declining a task will take you to the screen above, where you will be asked for comments. These comments will be sent to the sender in an automatic E-mail notification and will also be added to the history for the task.

C. **Mark as Complete when Accepting**
Check this box if you have already completed the task at the time of accepting. ** If you need to attached documents as part of completing the task you must accept the task without checking this box, add your attachment and then complete the task.

D. **Attachments**
You can view attached documents before choosing to Accept or Decline. Click on the Document name to view, or click on the folder icon to the right to download a copy of the document to your PC.

TASKING FOR THE EXTERNAL USER
REASSIGNING A TASK

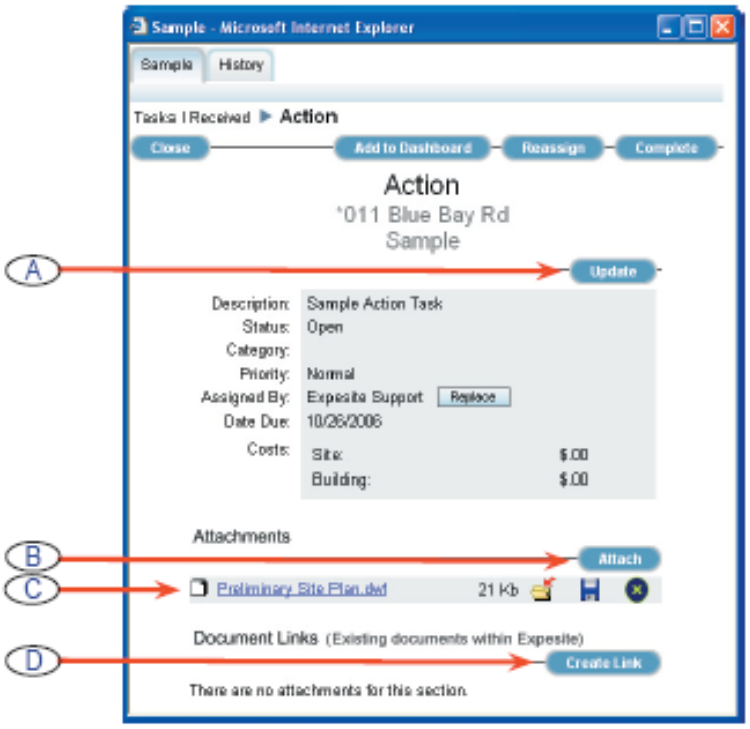


A. **Reassign**
Click reassign to make another user the recipient of the task. If you are the recipient of the task you are reassigning, you will not longer be associated with the task once complete.

B. **Reassign To:**
Use the drop down box to select a user you wish to reassign the task to from the team list.

C. **Explanation**
Provide an explanation so that all parties involved know why you are reassigning this task and then click Reassign.

TASKING FOR THE EXTERNAL USER
UPDATING A TASK



A. **Update**
Click Update to change task, including the task status to complete.

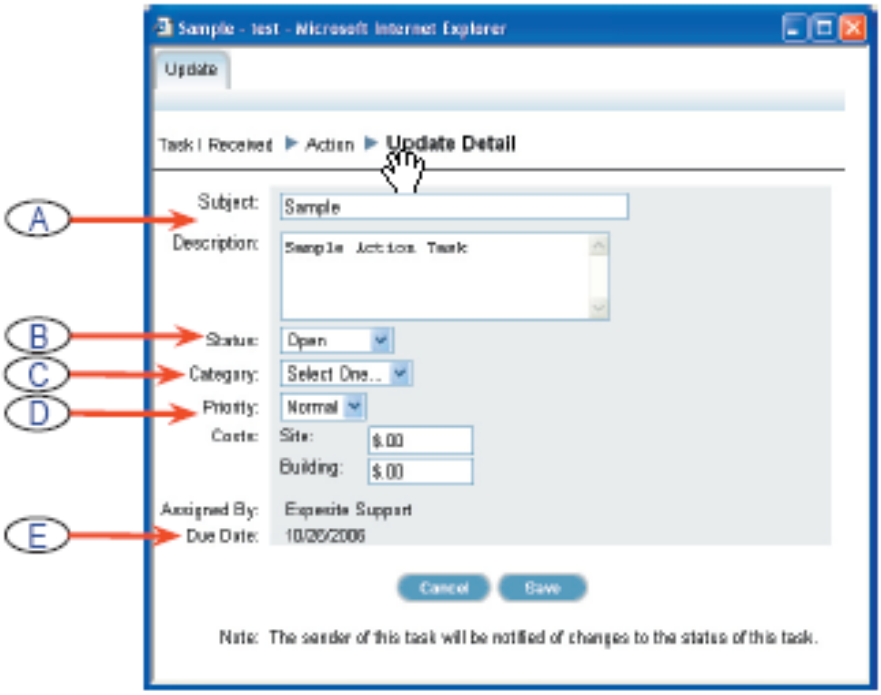
B. **Attach**
Click Attach button to bring up a screen where additional documents can be uploaded to this task.

C. **Existing Attachments**
Click on the Document name to view using Brava! Online viewer.

Folder Icon— Click here to download a copy of the document to your PC
Disk Icon— Click here to copy this document to a folder in the Documents Module
X Icon—Click here to remove this document from the task

D. **Create Links**
Click Create Link to reference documents that are currently posted to a folder in the Document Work Center for this project. This will bring up a window with the folder structure, click on the folder name to view all documents within and click on any document name to create link.

TASKING FOR THE EXTERNAL USER
OPEN TASK—UPDATING DETAIL



A. **Subject / Description**
Edit the task subject or description, any changes made will be automatically tracked in the task history.

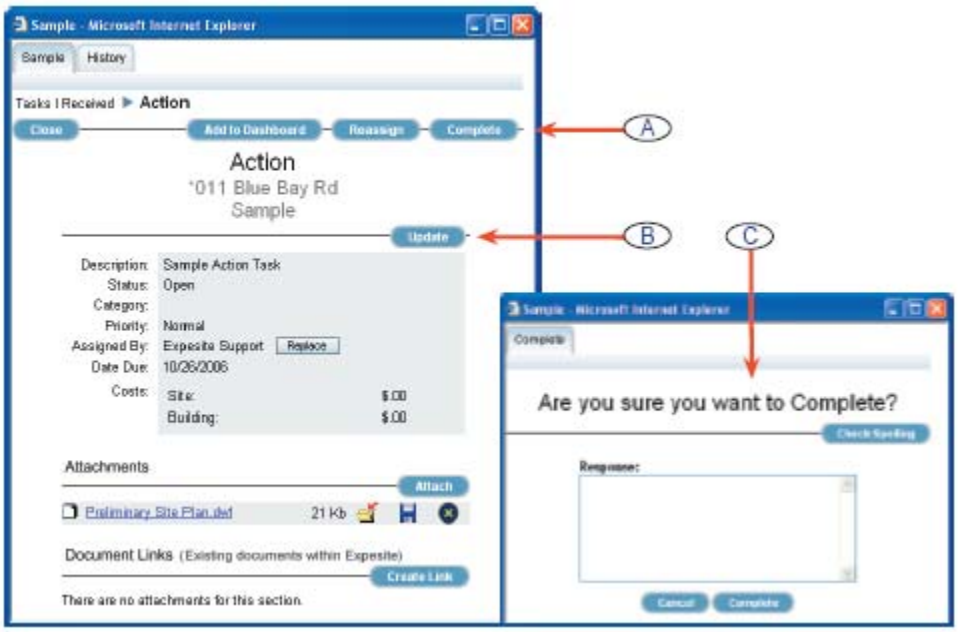
B. **Status**
Update the task status using the drop down box.

C. **Category**
Update the task category. You can then filter by the task category in the project tasks area or when creating a task report.

D. **Priority**
Update the task priority level from Normal to High or Low. This option is only available for the Recipient of the task and cannot be viewed by the sender or any other users.

E. **Due Date**
As the recipient of a task, you will not be able to update the due date. If you are in the update area as the sender of the task, this will be an open text field.

TASKING FOR THE EXTERNAL USER
COMPLETING A TASK



A. **Complete**
Click Complete button when you have completed the action requested in the task, this will bring up the screen below where a response can be provided. Your task will be changed to a complete status and hidden if you are not currently showing your completed tasks.

B. **Update Status**
Click Update to change the task status to Complete. As the sender of the task you will also have the ability to change the task status to Cancel Task if action is no longer necessary. Two of our task types have additional status below:

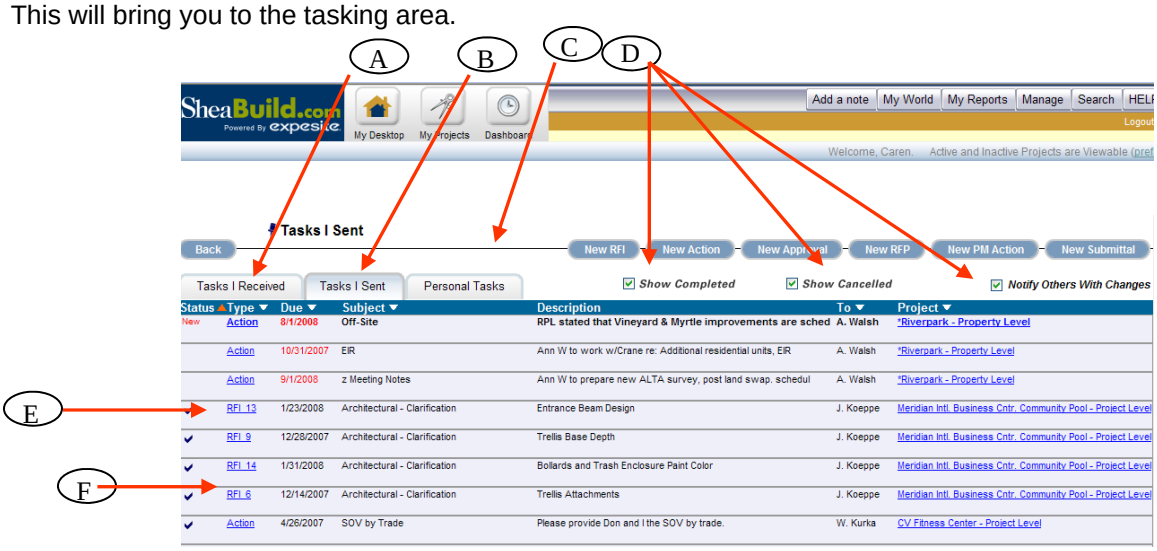
Submittal Status—Open; Cancel Task; Approved; Approved as Noted; Rejected; Revise & Resubmit.
Approval Status—Open; Approved; Approved with Comments; Not Approved.

C. **Response**
Provide a response so that all parties that are involved know why you are completing this task and then click Continue.

TASKING FOR THE INTERNAL USER

For Internal User's - make sure you are in the correct project and correct level within SheaBuild that you want to assign your task in and then click on "Project Tasks".

This will bring you to the tasking area.



A. **Tasks I Received**
View all tasks that I have received.

B. **Task I Sent**
View all tasks that I have sent.

C. **Personal Tasks**
Personal Tasks can be thought of as a personal 'To Do List'. Personal Tasks are non specific and can not be seen by any other system users. Your critical Personal tasks will be included in your Daily notification of Critical dates and can also be added to your Digital Dashboard via the Configure Dashboard button, located in the right corner of the Digital Dashboard screen.

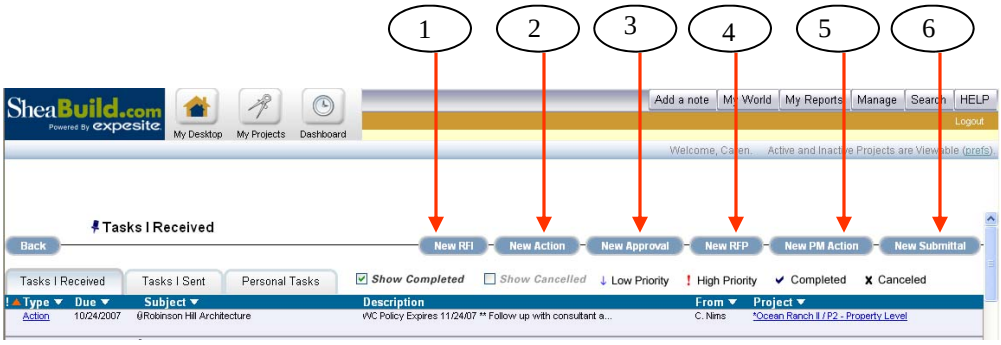
D. **Show Completed / Cancelled Tasks**
Select to show or hide completed and cancelled tasks by checking or unchecking the boxes.

Notify Others With Changes
When you Select "Notify Others With Changes" it gives you the option to notify others when you have updated, added a new attachment or completed the task.

E. **Priority / Status**
This shows the priority of your tasks (low/high) and the status (new, completed, declined, cancelled). Use the key at the top of the page to determine the priority or status. If a task has no icon next to it, it's an open task of normal priority. Tasks will stay in the New status until the recipient has accepted or declined the task.

F. **Task Type**
Click on the Task Type (RFI or Action) to open the task detail and view additional information.

TASKING FOR THE INTERNAL USER



1. **New RFI—Request for Information**
   Use this task to make a formal request for information, primarily during bidding and construction. New RFI's can be sent to one person on one specific project at a time.

2. **New Action**
   Use this task as a general request for something to be done such as a design change, meeting request, etc. Action tasks can be sent to one person across multiple projects.

3. **New Approval**
   Use this task to request approval for a Design Document, Construction Document, Material/ Color Selection, Payment, Schedule Issue, etc. Approval tasks can be sent to multiple people on one specific project at a time.

4. **New RFP—Request for Proposal**
   Use this task for Professional Services, Design Changes, Change Orders, etc. RFP tasks can be sent to multiple people on one specific project at a time. RFP tasks can also be sent to SheaBuild users who are not on the project.

5. **New PM Action**
   Use this task to send a general request to the user set as PM in the Standard Project Information area. This task is identical to an Action Task other than it's automatic assignment to the PM role.

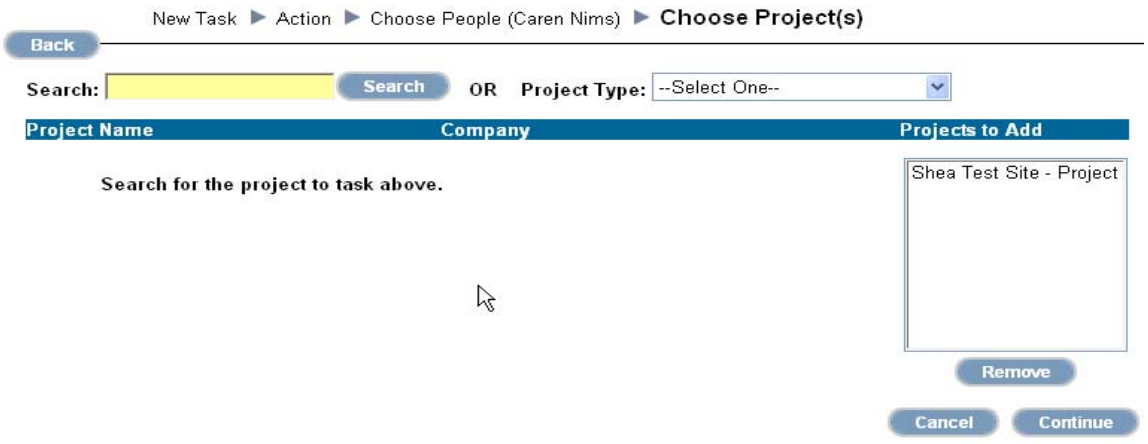
6. **New Submittal**
   Use this task to log Material Samples, Color Samples, Shop Drawings, or Product Literature. New Submittals can be sent to one person on one specific project at a time.

TASKING FOR THE INTERNAL USER
SEND A NEW TASK—CHOOSE PEOPLE

Search or Select a User
A list of currents users for that specific project will automatically show below the search area. Click on user's name to choose the person to be the recipient of your task. If you are sending an Approval or RFP task, you will have the opportunity to select multiple users to send your task to. Clicking on the user's name will put them in a box on the right side of the screen; click continue when your recipient list is complete.

You do have the option to Search if necessary.

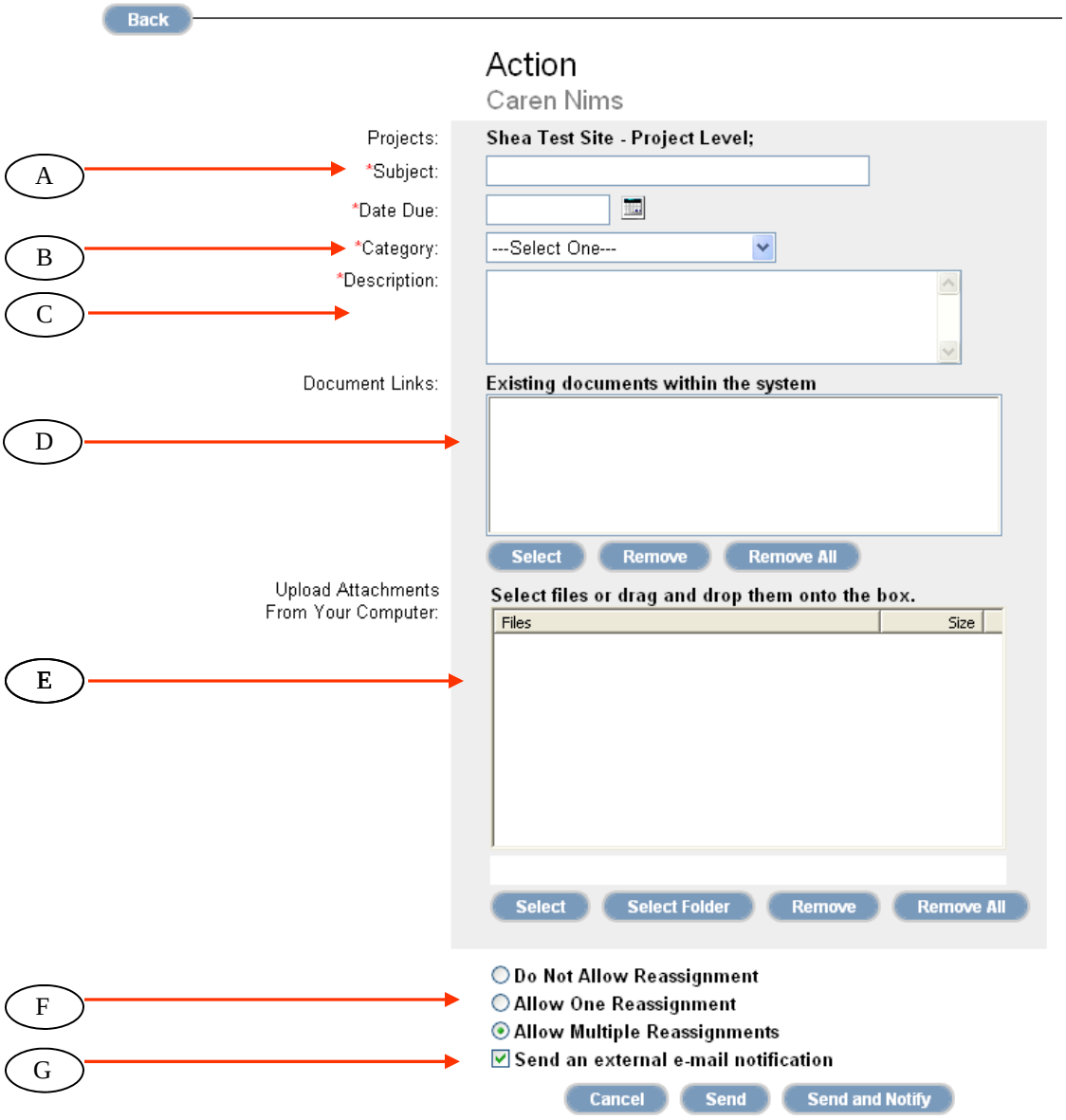
SEND A NEW TASK—CHOOSE PROJECTS



Choose Projects
The current Project you are in will automatically appear in the box to the right of your screen. If you are sending an Action task, you will have the opportunity to search and select multiple projects to send your task for. Clicking on the project name will put it in a box on the right side of the screen; click continue when your project list is complete.

*** If you select multiple users or projects to create a task for, a separate task will be created for each user or project selected.

TASKING FOR THE INTERNAL USER
SEND A NEW TASK—ENTER TASK INFORMATION



A. **Tasks Fields**
Fill in the task information (* denotes a required field).

B. **Category**
Update the task category. You can then filter by the task category in the project tasks area or when creating a report. Shea Properties uses the following categories for all RFI's—please select either SITE or BUILDING when doing an RFI.

C. **Description**
This is where you would outline what you want done for the person you are sending the task to.

Continued on next page

TASKING FOR THE INTERNAL USER
SEND A NEW TASK—ENTER TASK INFORMATION

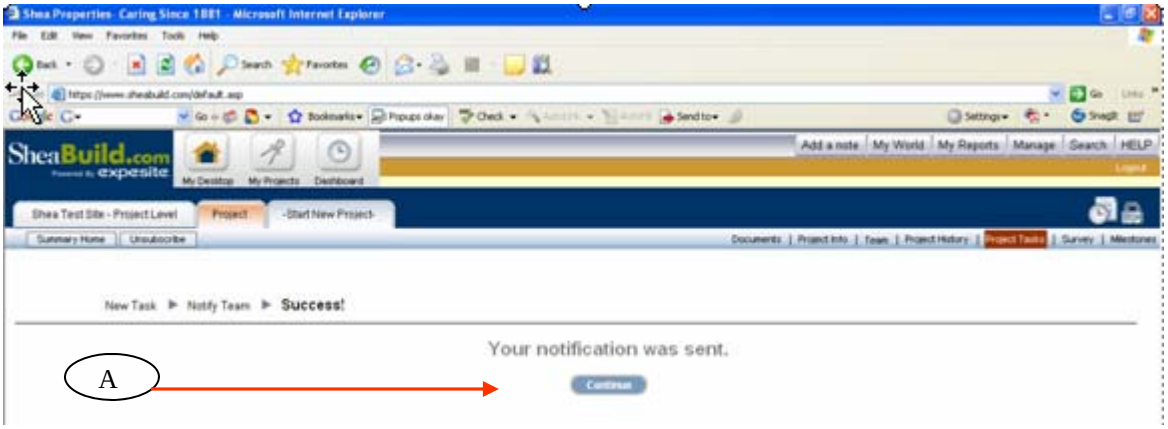
D. **Document Links**
Add links to documents that are currently posted to a folder under the Document Tab for this Project. Clicking Select will bring up the folder structure, click on the folder name to view all documents within and click document name to create link.

E. **Attachments**
Attach documents from your computer to provide additional information. Click Select to search for a document to upload from your computer or network. You can also drag and drop documents onto the file list (from your computer, not from the select box).

F. **Allow Reassignment**
By default tasks will be set to Allow Multiple Reassignments. You can choose to limit or not allow reassignments by clicking the radio button to the left of your choice. As the sender, you will always be notified if the task is reassigned by the recipient.

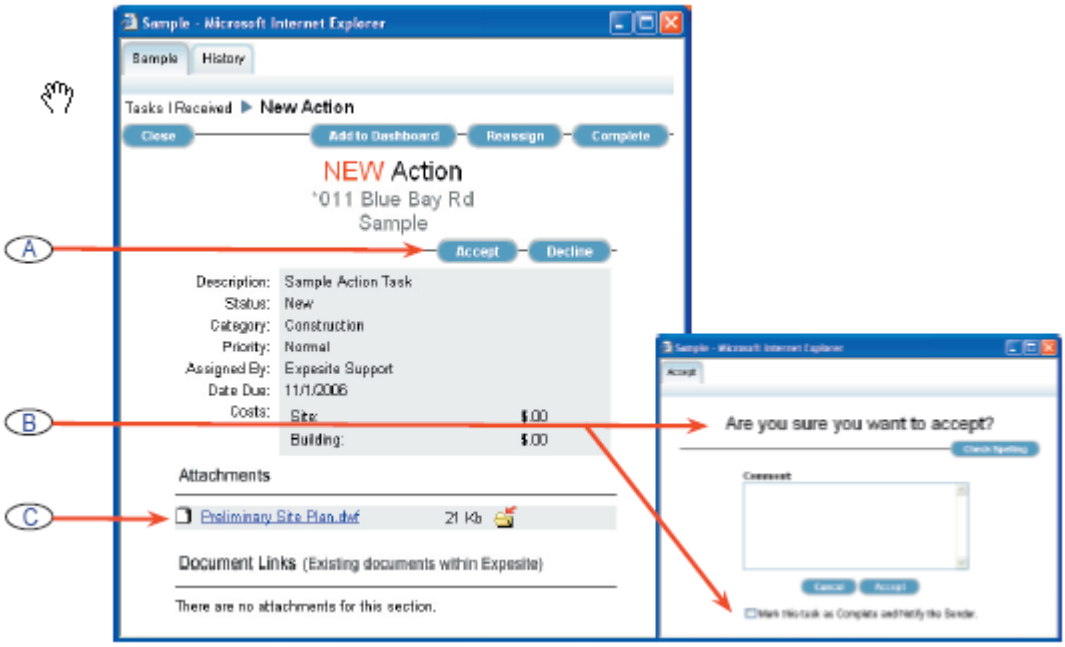
G. **Send an External E-mail Notification**
Check this box to notify the recipient via E-mail that you have sent them a task.

TASK CONFIRMATION



A. You will be taken to the screen below when your task has been sent. Click continue to be taken back to the page you created your task from.

TASKING FOR THE INTERNAL USER
RECEIVING A NEW TASK—ACCEPT OR DECLINE



A. **Accept**
Click Accept to accept responsibility for completing the task, this will change the task from a New status to an Open status. This does not complete the task, the purpose of accepting is for the Recipient to let the sender know they have reviewed the task and will complete it by the requested due date.

Decline
Click Decline to let the sender know you will not be accepting responsibility for completing this task. Some reasons for declining a task: insufficient information, unreasonable due date, or incorrect assignment. When a task is declined, the sender will have the ability to easily update the task or forward to another party.

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Accepting or Declining a task will take you to the screen above, where you will be asked for comments. These comments will be sent to the sender in an automatic E-mail notification and will also be added to the history for the task.

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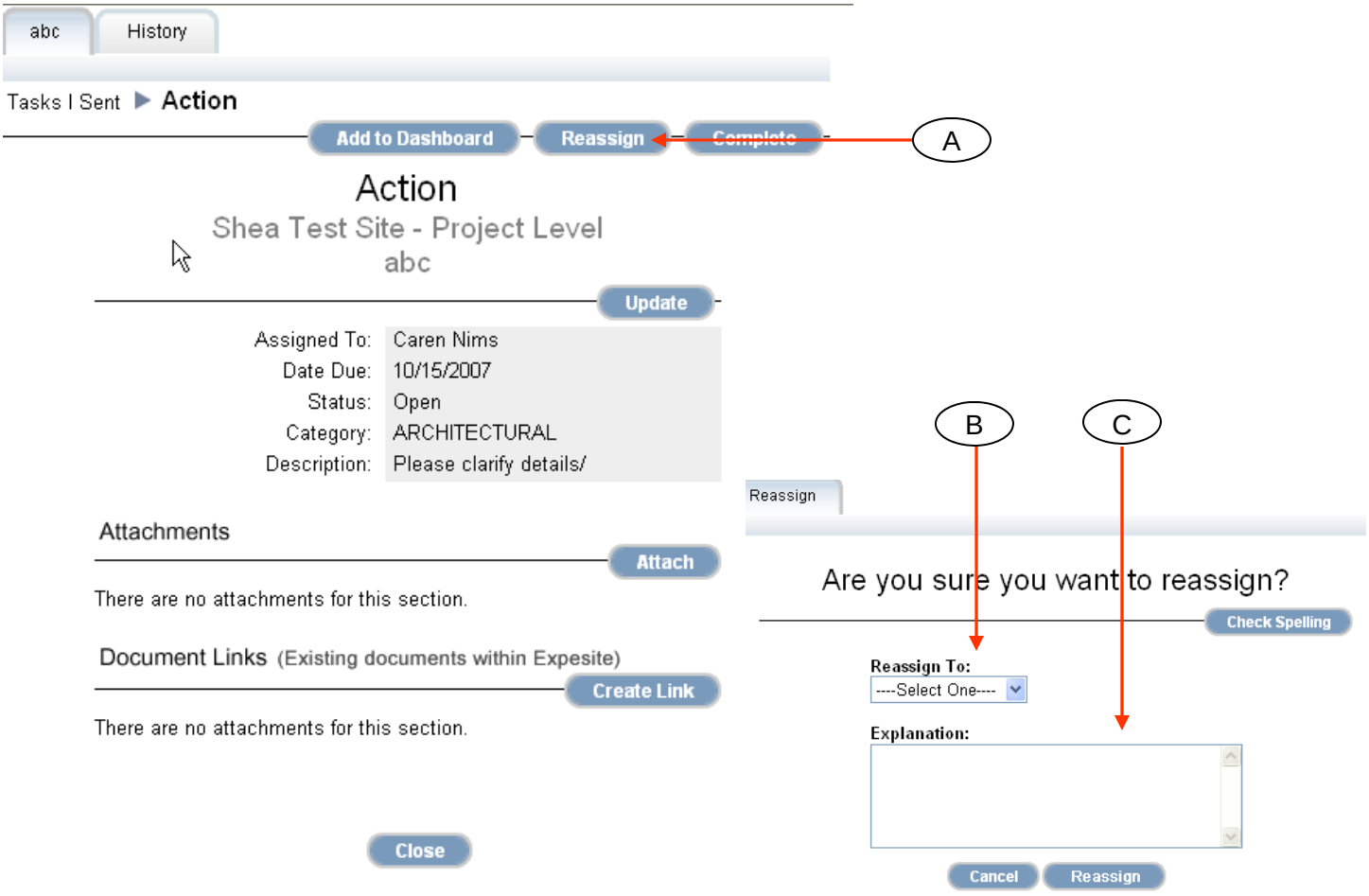
Check this box if you have already completed the task at the time of accepting. ** If you need to attached documents as part of completing the task you must accept the task without checking this box, add your attachment and then complete the task.

D. **Attachments**
You can view attached documents before choosing to Accept or Decline. Click on the Document name to view, or click on the folder icon to the right to download a copy of the document to your PC.

TASKING FOR THE INTERNAL USER
REASSIGNING A TASK

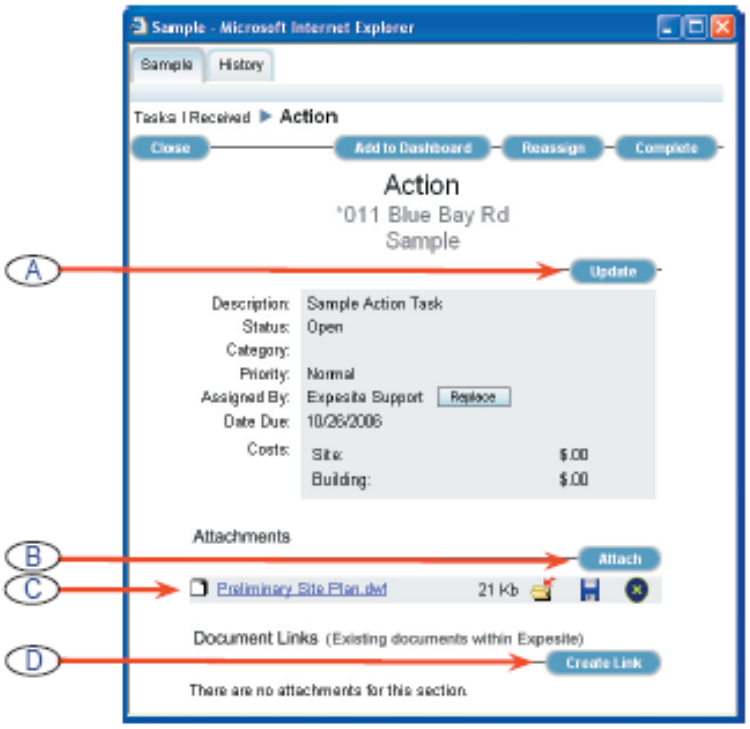


A. **Reassign**
Click reassign to make another user the recipient of the task. If you are the recipient of the task you are reassigning, you will not longer be associated with the task once complete.

B. **Reassign To:**
Use the drop down box to select a user you wish to reassign the task to from the team list.

C. **Explanation**
Provide an explanation so that all parties involved know why you are reassigning this task and then click Reassign.

TASKING FOR THE INTERNAL USER
UPDATING A TASK



A. **Update**
Click Update to change task, including the task status to complete.

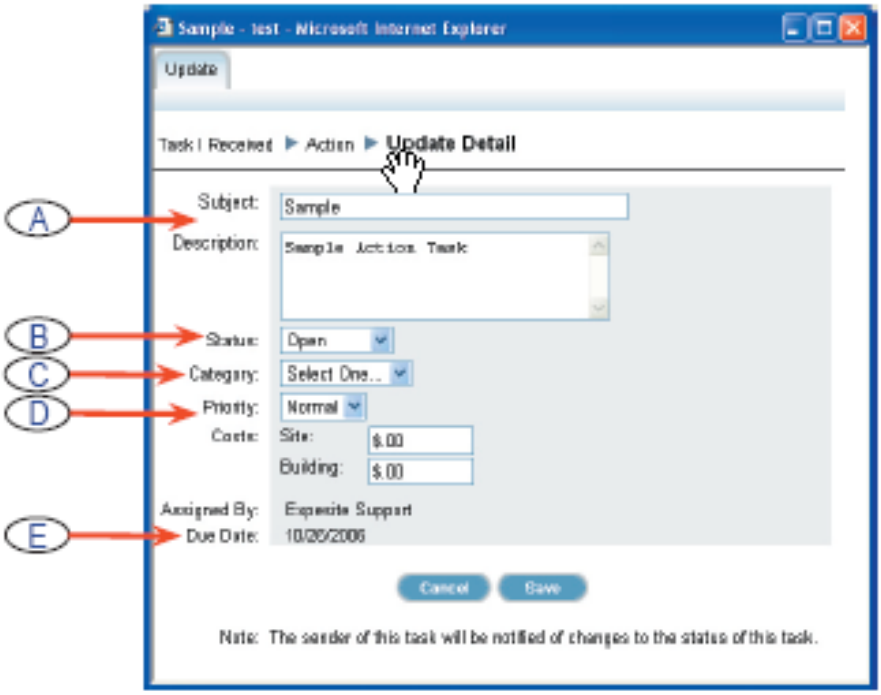
B. **Attach**
Click Attach button to bring up a screen where additional documents can be uploaded to this task.

C. **Existing Attachments**
Click on the Document name to view using Brava! Online viewer.

Folder Icon— Click here to download a copy of the document to your PC
Disk Icon— Click here to copy this document to a folder in the Documents Module
X Icon—Click here to remove this document from the task

D. **Create Links**
Click Create Link to reference documents that are currently posted to a folder in the Document Work Center for this project. This will bring up a window with the folder structure, click on the folder name to view all documents within and click on any document name to create link.

TASKING FOR THE INTERNAL USER
OPEN TASK—UPDATING DETAIL



A. **Subject / Description**
Edit the task subject or description, any changes made will be automatically tracked in the task history.

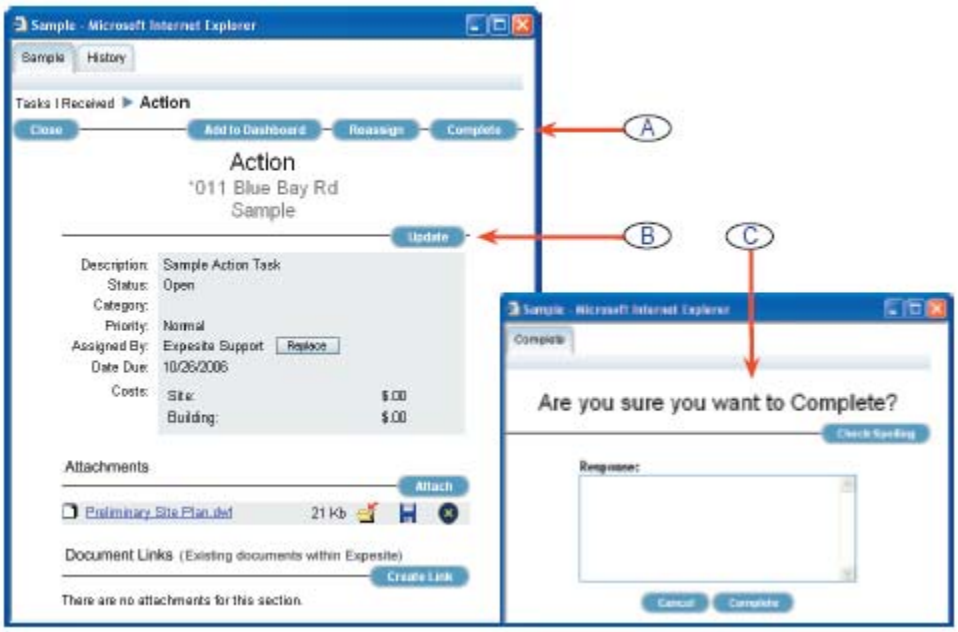
B. **Status**
Update the task status using the drop down box.

C. **Category**
Update the task category. You can then filter by the task category in the project tasks area or when creating a task report.

D. **Priority**
Update the task priority level from Normal to High or Low. This option is only available for the Recipient of the task and cannot be viewed by the sender or any other users.

E. **Due Date**
As the recipient of a task, you will not be able to update the due date. If you are in the update area as the sender of the task, this will be an open text field.

TASKING FOR THE INTERNAL USER
COMPLETING A TASK



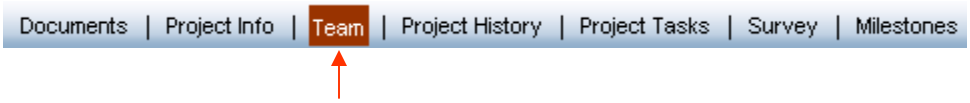
A. **Complete**
Click Complete button when you have completed the action requested in the task, this will bring up the screen below where a response can be provided. Your task will be changed to a complete status and hidden if you are not currently showing your completed tasks.

B. **Update Status**
Click Update to change the task status to Complete. As the sender of the task you will also have the ability to change the task status to Cancel Task if action is no longer necessary. Two of our task types have additional status below:

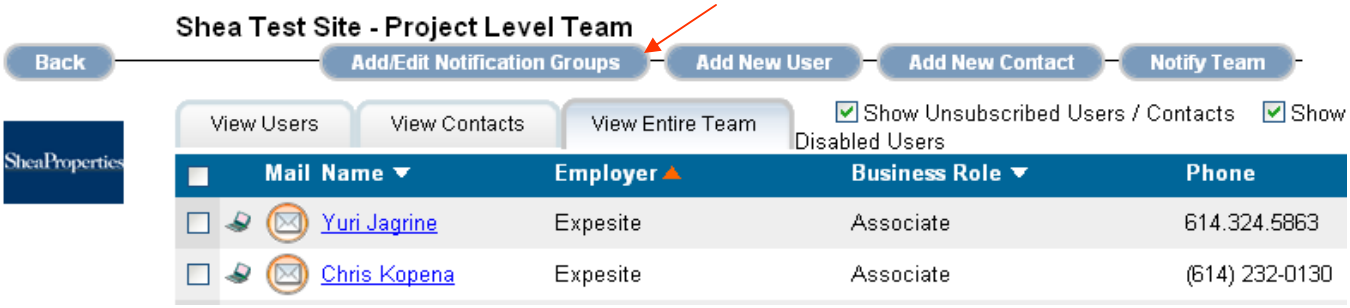
Submittal Status—Open; Cancel Task; Approved; Approved as Noted; Rejected; Revise & Resubmit.
Approval Status—Open; Approved; Approved with Comments; Not Approved.

C. **Response**
Provide a response so that all parties that are involved know why you are completing this task and then click Continue.

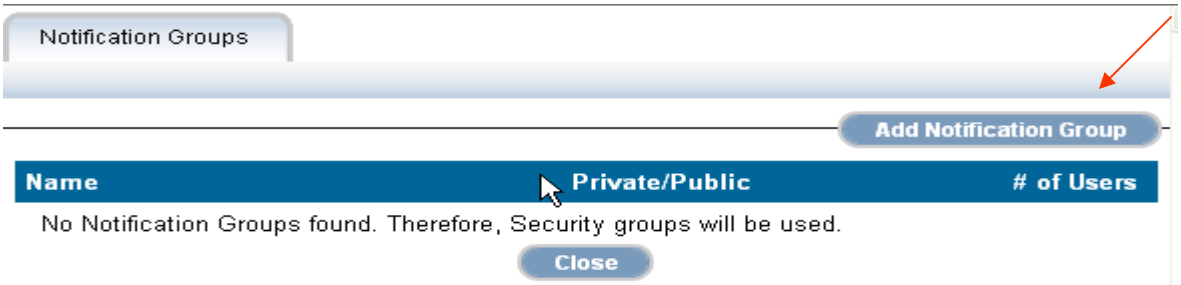
HOW TO ADD OR EDIT NOTIFICATION GROUPS
ADDING A NOTIFICATION GROUP



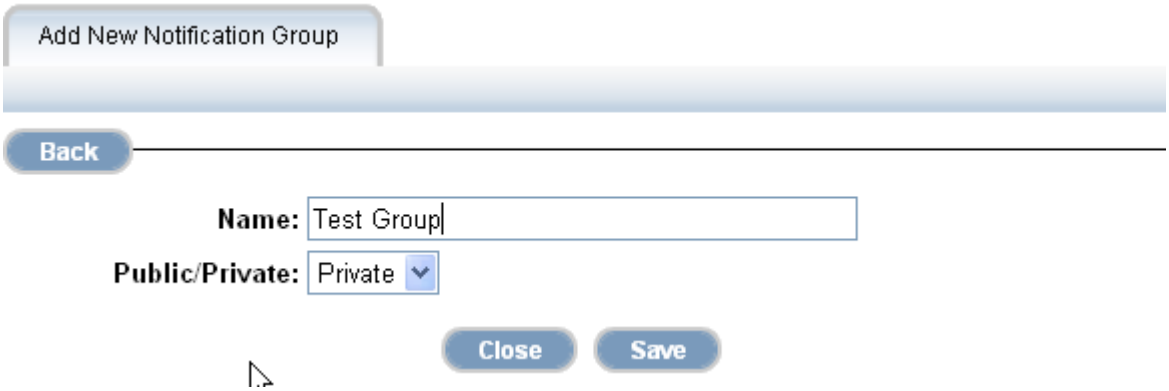
1.) Make sure you are in the appropriate level within SheaBuild (Property, Project, Building, Tenant) and click on Team.



2.) Click on Add/Edit Notification Groups

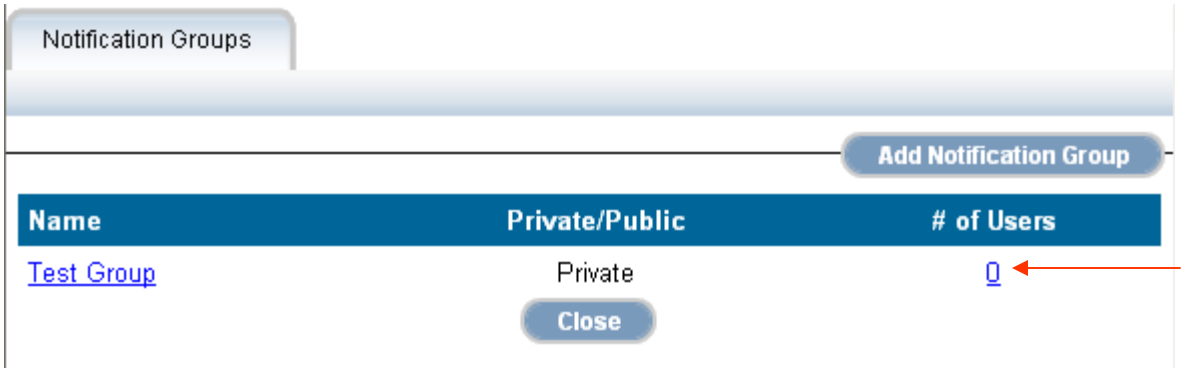


3.) Click on Add Notification Group

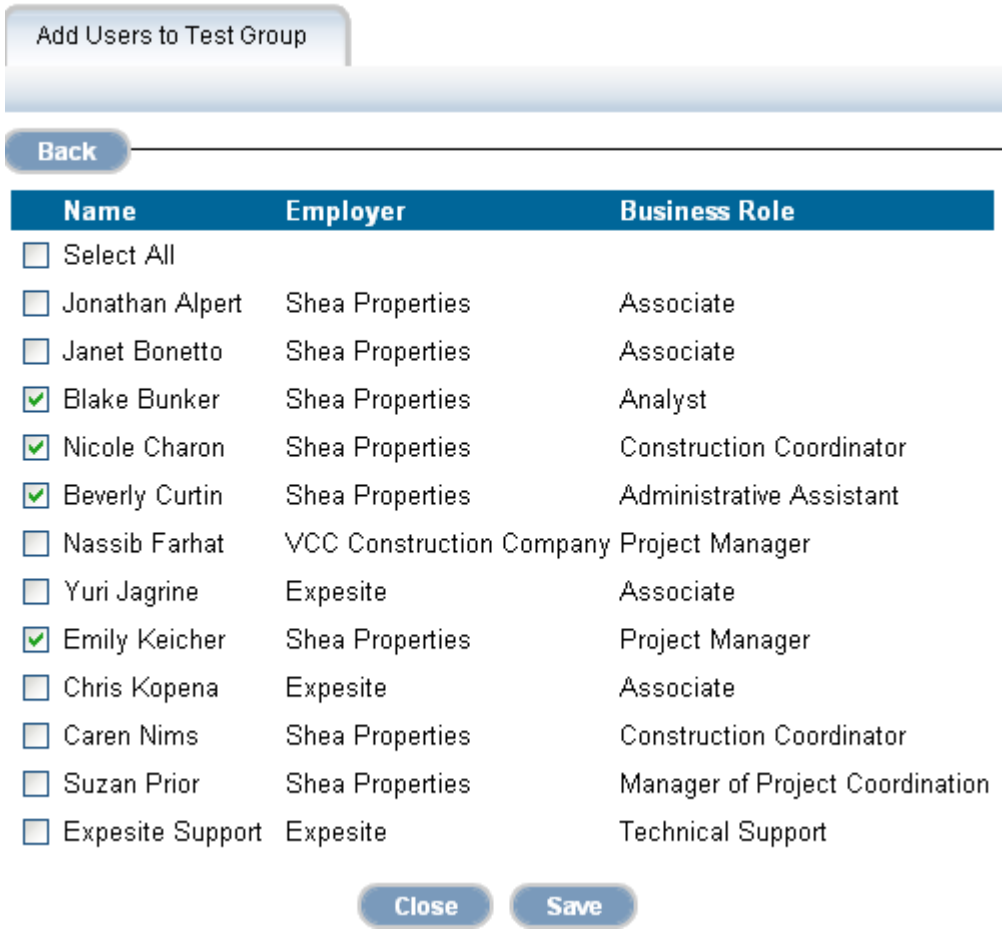


4.) Type in the name of your Notification Group and click Save

HOW TO ADD OR EDIT NOTIFICATION GROUPS
ADDING A NOTIFICATION GROUP

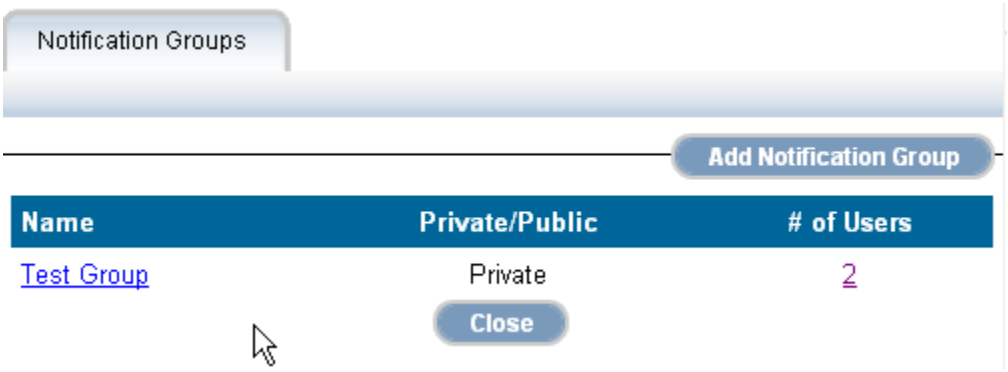


5.) Click on the # of Users button. For new groups that will be the 0 you see to the right of the screen



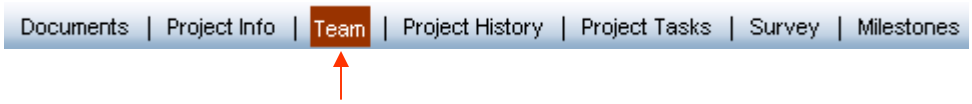
6.) This is where you can click and select the individuals that make up your specific team. Once you have selected everyone you want click the Save button

HOW TO ADD OR EDIT NOTIFICATION GROUPS
ADDING A NOTIFICATION GROUP



7.) Click the Close button

SENDING A NOTIFICATION TO A GROUP



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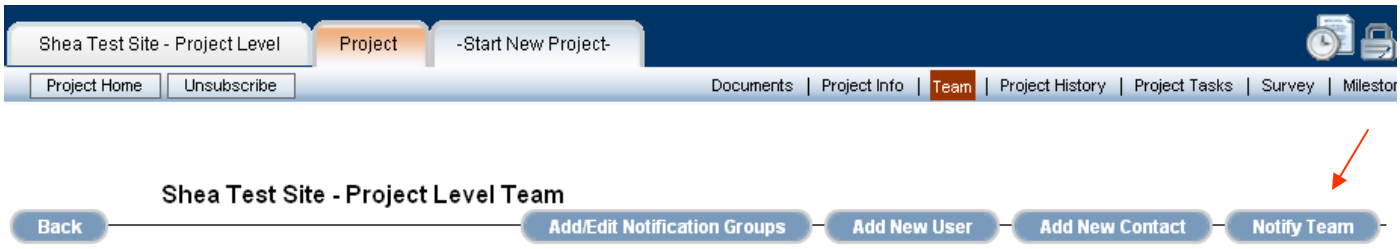
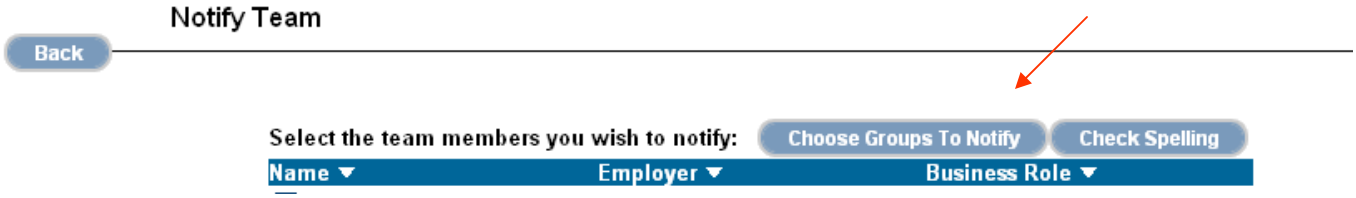
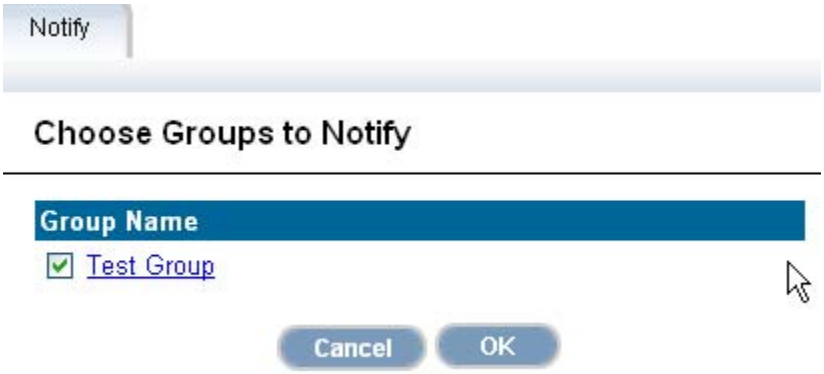

Shea Test Site - Project Level
Project
-Start New Project-
Project Home
Unsubscribe
Documents | Project Info | Team | Project History | Project Tasks | Survey | Milestor
Shea Test Site - Project Level Team
Back
Add/Edit Notification Groups
Add New User
Add New Contact
Notify Team

2.) Click on Notify Team

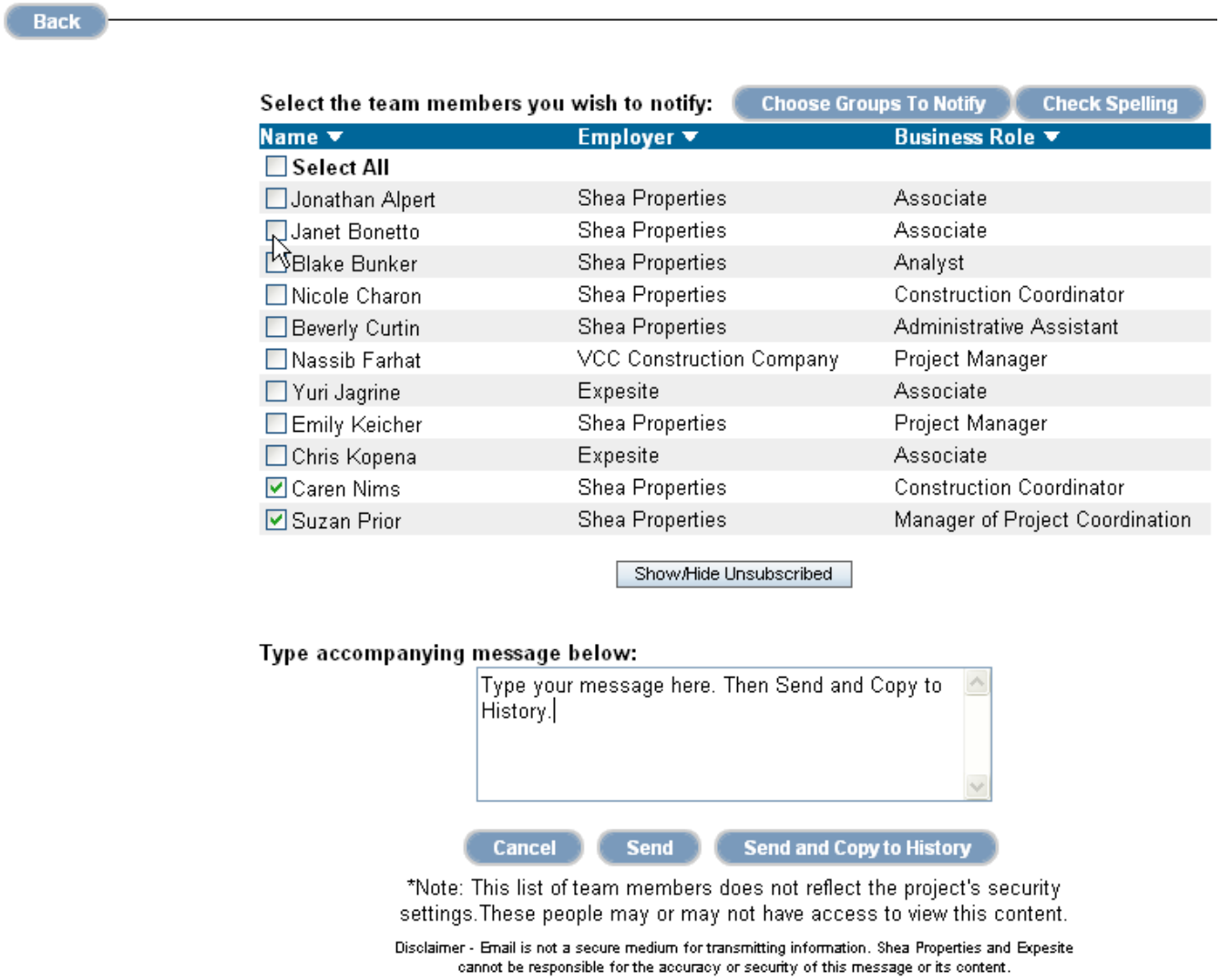


3.) Click on Choose Groups To Notify



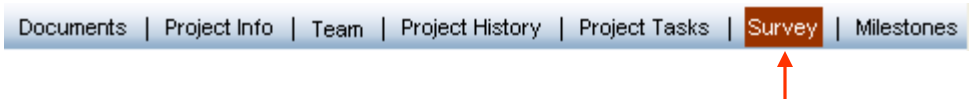
4.) Select the Groups you want to notify and click Ok.

SENDING A NOTIFICATION TO A GROUP


Back
Select the team members you wish to notify:
Choose Groups To Notify
Check Spelling
Name
Employer
Business Role
Select All
Jonathan Alpert Shea Properties Associate
Janet Bonetto Shea Properties Associate
Blake Bunker Shea Properties Analyst
Nicole Charon Shea Properties Construction Coordinator
Beverly Curtin Shea Properties Administrative Assistant
Nassib Farhat VCC Construction Company Project Manager
Yuri Jagrine Expesite Associate
Emily Keicher Shea Properties Project Manager
Chris Kopena Expesite Associate
Caren Nims Shea Properties Construction Coordinator
Suzan Prior Shea Properties Manager of Project Coordination
Show/Hide Unsubscribed
Type accompanying message below:
Type your message here. Then Send and Copy to History.
Cancel
Send
Send and Copy to History
*Note: This list of team members does not reflect the project's security settings.These people may or may not have access to view this content.
Disclaimer - Email is not a secure medium for transmitting information. Shea Properties and Expesite cannot be responsible for the accuracy or security of this message or its content.

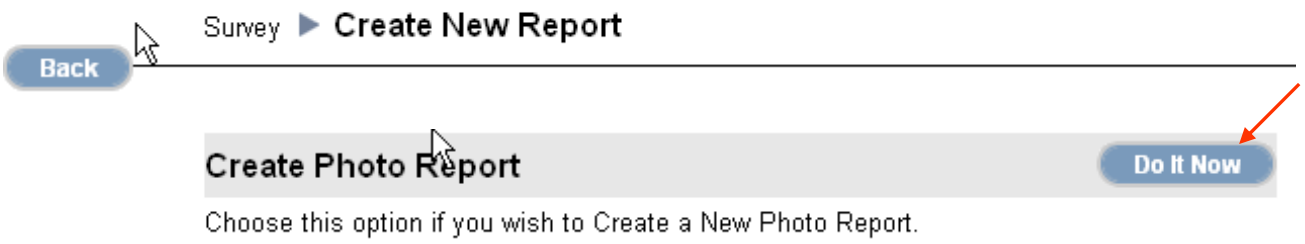
5.) Type your message and Send and Copy to History

CREATING A PHOTO SURVEY

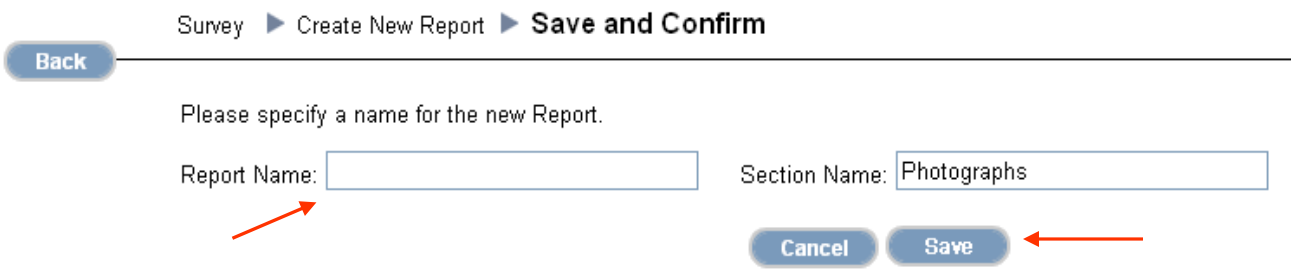


1.) Make sure you are in the appropriate level within SheaBuild (Property, Project, Building, Tenant) and click on Survey.

2.) Click on Create New Report



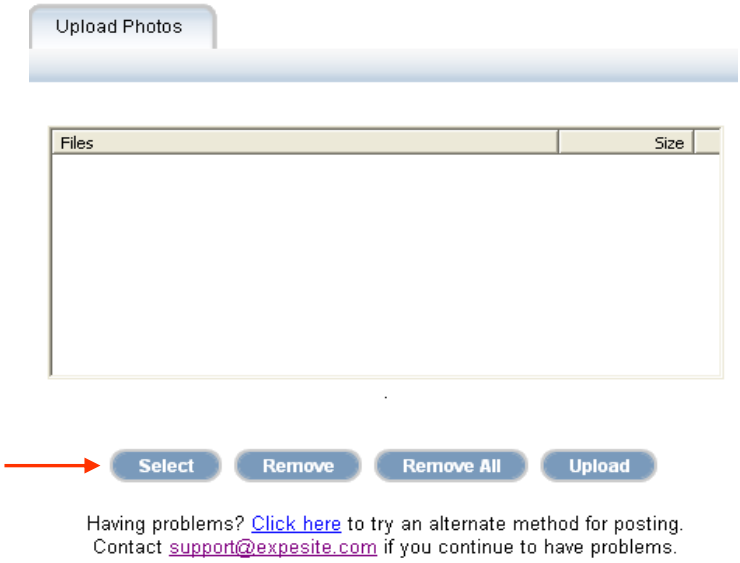
3.) Click on Do It Now



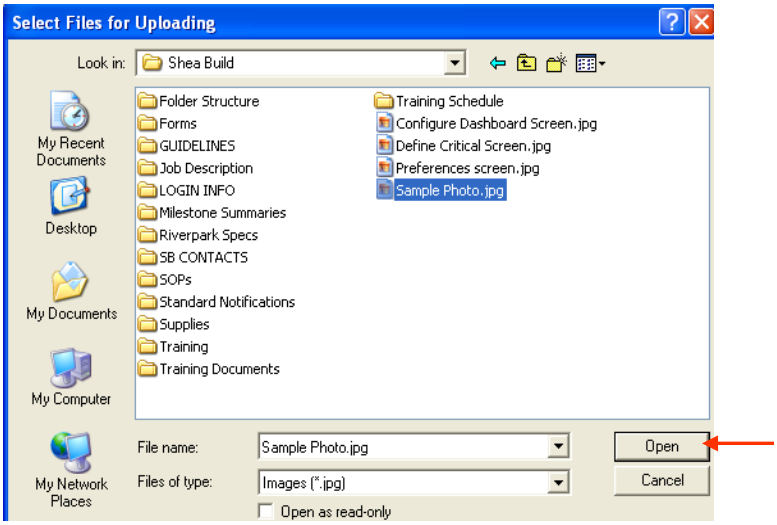
4.) Name your Report and Click on Save.

CREATING A PHOTO SURVEY

5.) Click on Add Photos

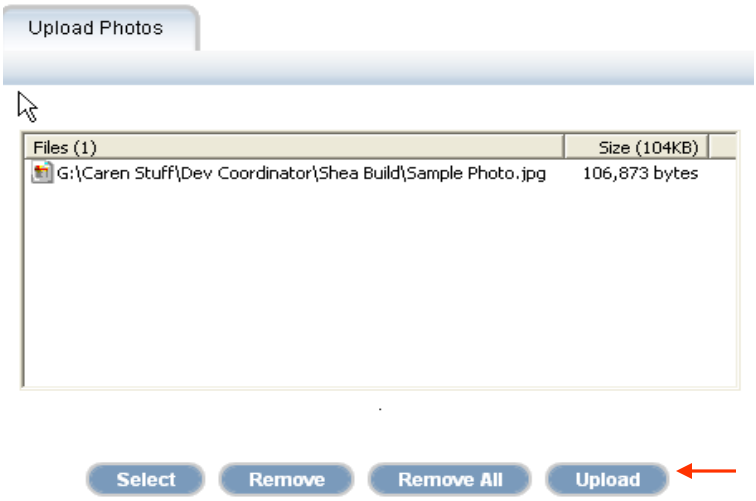


6.) Click on Select

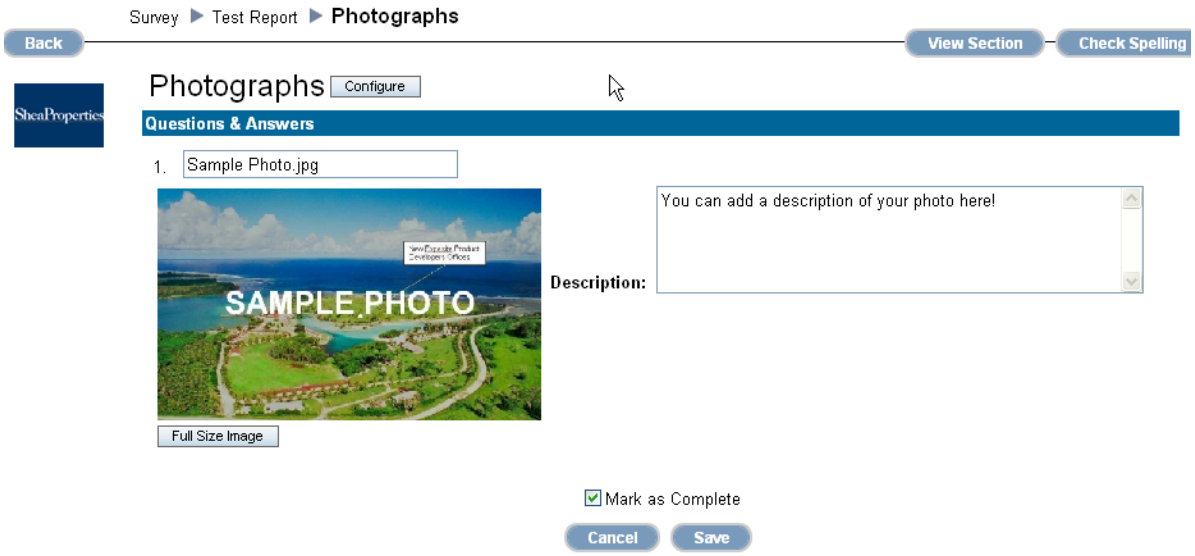


7.) Choose your photos. You can choose more than one by holding down the Control key—once you have finished you selection you will Click on Open.

CREATING A PHOTO SURVEY

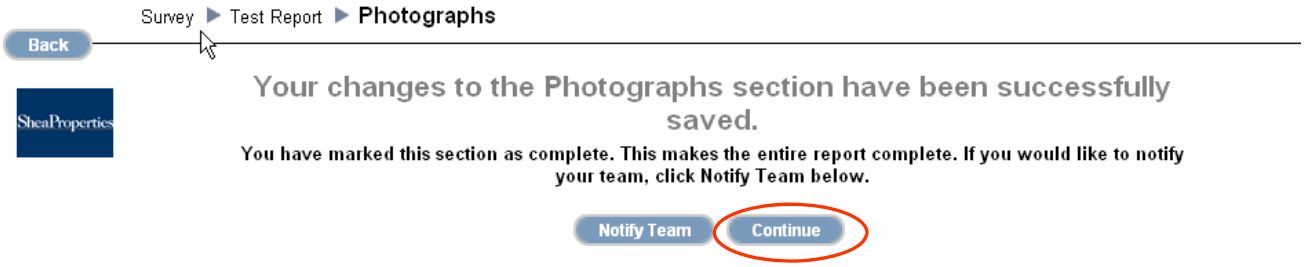


8.) Click Upload

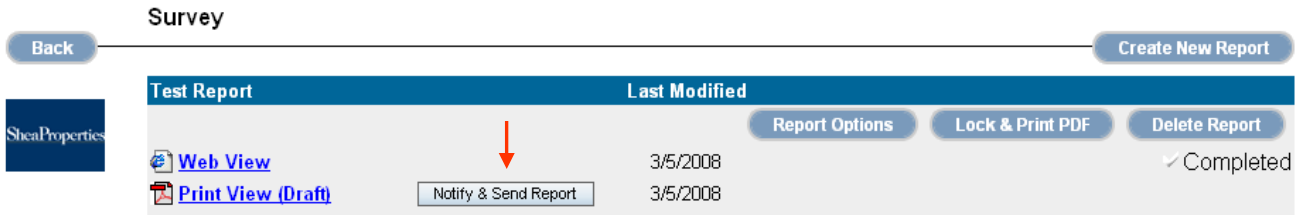


9.) For each photo uploaded you can add a description in the text box to the left of the photo. Once you have entered all of your descriptions click on “Mark as Complete” and Save.

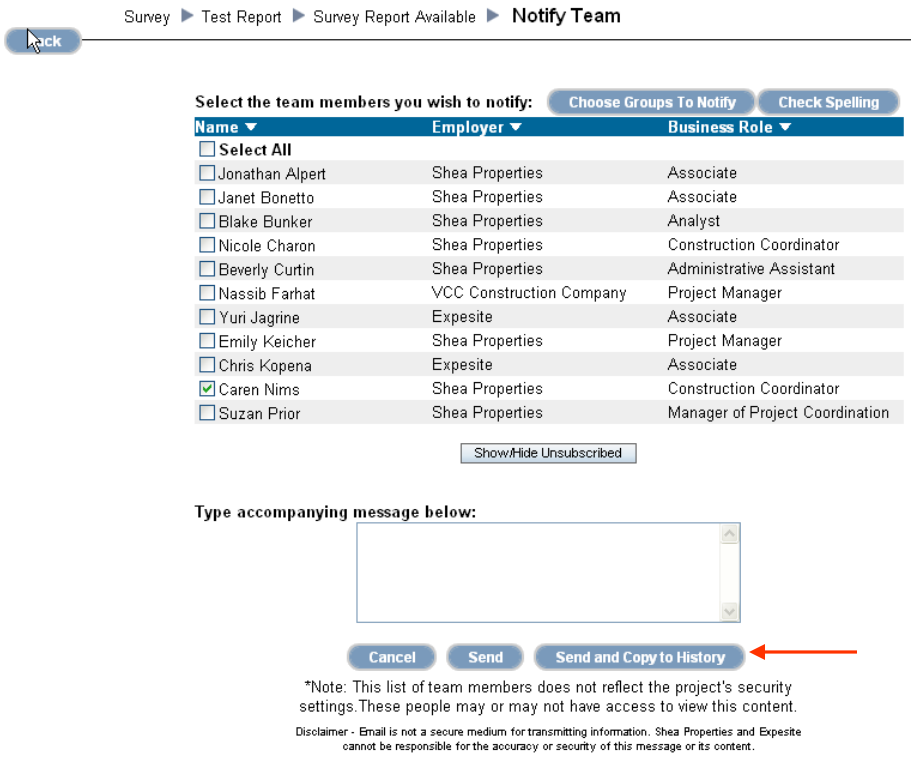
CREATING A PHOTO SURVEY


Survey ▶ Test Report ▶ Photographs
Back
Your changes to the Photographs section have been successfully saved.
You have marked this section as complete. This makes the entire report complete. If you would like to notify your team, click Notify Team below.
Notify Team
Continue

10.) Do NOT Notify Team at this point - just Click Continue.

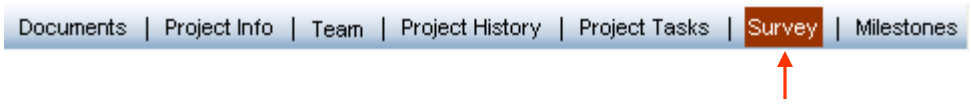


11.) Click back in to Surveys and make sure you are at your current Photo Survey - this is where we will Notify & Send Report from. This will send a link to SheaBuild and also a pdf of the report.


Survey ▶ Test Report ▶ Survey Report Available ▶ Notify Team
Back
Select the team members you wish to notify:
Choose Groups To Notify
Check Spelling
Name
Employer
Business Role
Select All
Jonathan Alpert — Shea Properties — Associate
Janet Bonetto — Shea Properties — Associate
Blake Bunker — Shea Properties — Analyst
Nicole Charon — Shea Properties — Construction Coordinator
Beverly Curtin — Shea Properties — Administrative Assistant
Nassib Farhat — VCC Construction Company — Project Manager
Yuri Jagrine — Expesite — Associate
Emily Keicher — Shea Properties — Project Manager
Chris Kopena — Expesite — Associate
Caren Nims — Shea Properties — Construction Coordinator
Suzan Prior — Shea Properties — Manager of Project Coordination
Show/Hide Unsubscribed
Type accompanying message below:
Cancel
Send
Send and Copy to History
*Note: This list of team members does not reflect the project's security settings.These people may or may not have access to view this content.
Disclaimer - Email is not a secure medium for transmitting information. Shea Properties and Expesite cannot be responsible for the accuracy or security of this message or its content.

12.) Choose from the list who you want to notify—type a message if you want and Send and Copy to History.

COPYING AN EXISTING SITE PHOTO SURVEY



1.) Make sure you are in the appropriate level within SheaBuild (Property, Project, Building, Tenant) and click on Survey. Click on Create New Report.

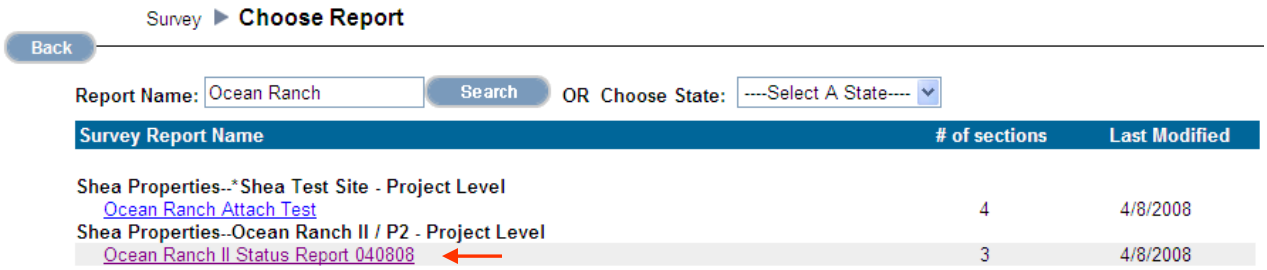
2.) Select Report "Copy Report with Content" and Click on Do It Now

Survey ▶ Create New Report
Back
Copy Report With Content
Do It Now
Choose this option if you wish to Create a New Report with content from an Existing Report.
You will have the option to copy authorities, contacts, answer or attachments.

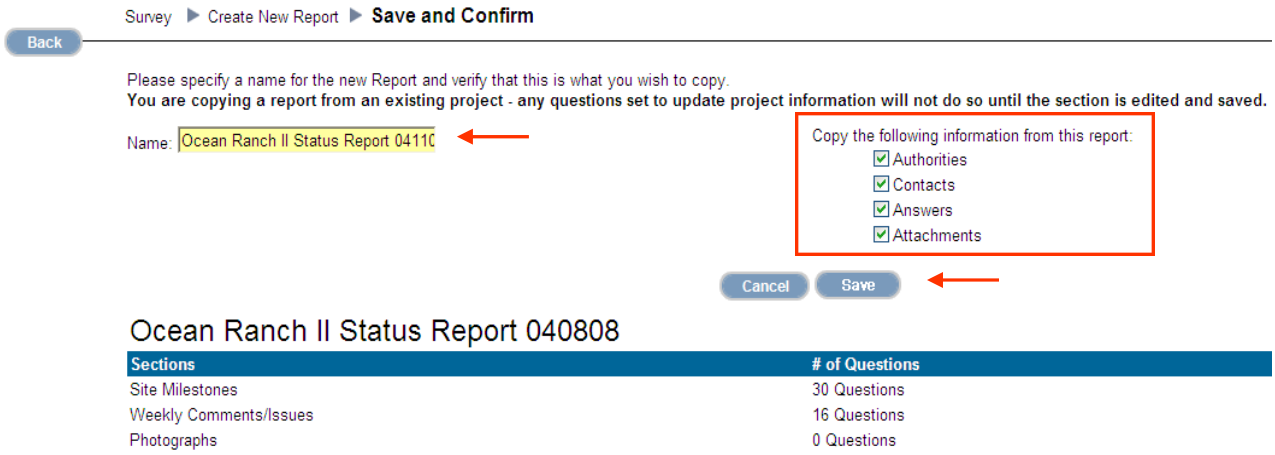
3.) Search for name of Survey Report you want to copy.

COPYING AN EXISTING SITE PHOTO SURVEY

4.) Search will bring up a list of Survey Reports to choose from. Click on the Survey that you want to copy.



5.) Please type in the name of your new Survey Report. If we were to follow the example from above we would call this Survey below Ocean Ranch II Status Report & the Current Date. You also want to place check marks in the boxes to the right of your screen. This will copy the information from the previous survey into your new one. Then Click the Save button.

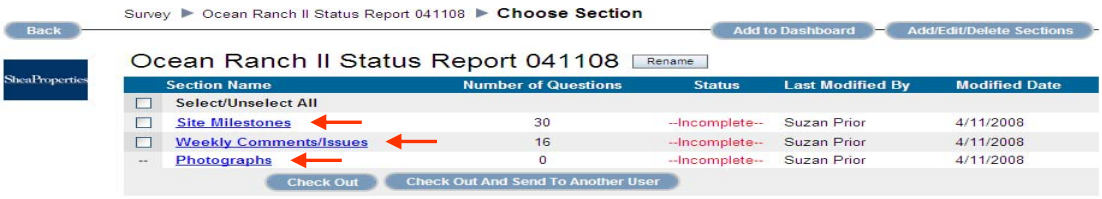

Survey ▶ Create New Report ▶ Save and Confirm
Back
Please specify a name for the new Report and verify that this is what you wish to copy.
You are copying a report from an existing project - any questions set to update project information will not do so until the section is edited and saved.
Name: Ocean Ranch II Status Report 0411
Copy the following information from this report:
Authorities
Contacts
Answers
Attachments
Cancel
Save
Ocean Ranch II Status Report 040808
Sections
# of Questions
Site Milestones
30 Questions
Weekly Comments/Issues
16 Questions
Photographs
0 Questions

6.) Your new Survey Report has been created.

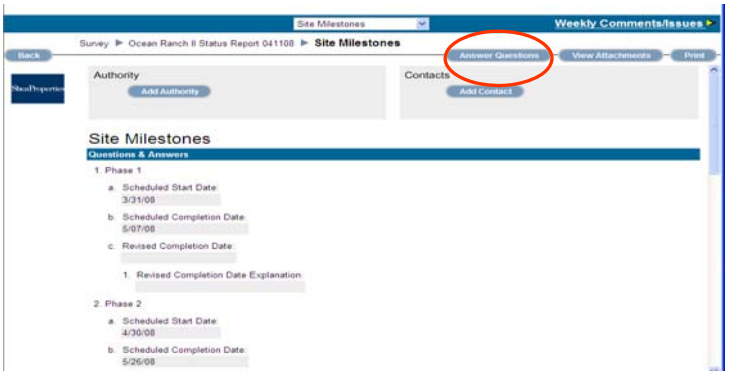
7.) To start updating your new Survey Report Click on Web View.

COPYING AN EXISTING SITE PHOTO SURVEY

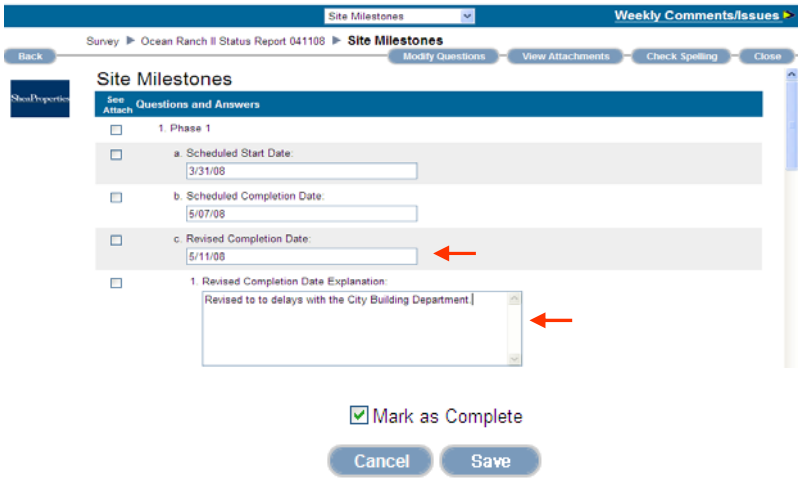
8.) Choose the Section you want to update by clicking on it. In this Example we are going to update the Site Milestones.



9.) To update this Section Click on the “Answer Questions” button.

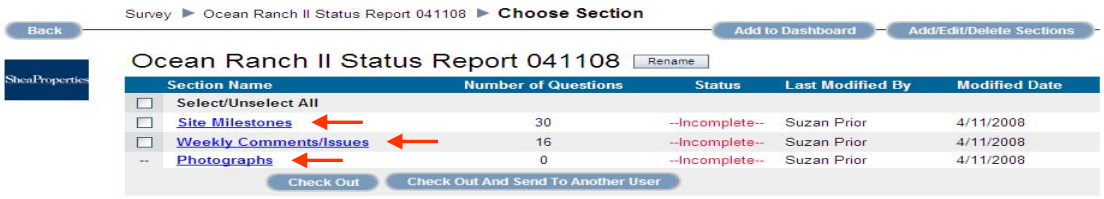


10.) This is where you would type a revised date and an explanation for the change in your schedule. Once you have finished updating you would scroll to the very bottom and Click on the Check Box next to “Mark as Complete” and then Click “Save”. The system will ask if you want to Send and Notify or Continue. Please Continue. Do NOT Send and Notify at this point.

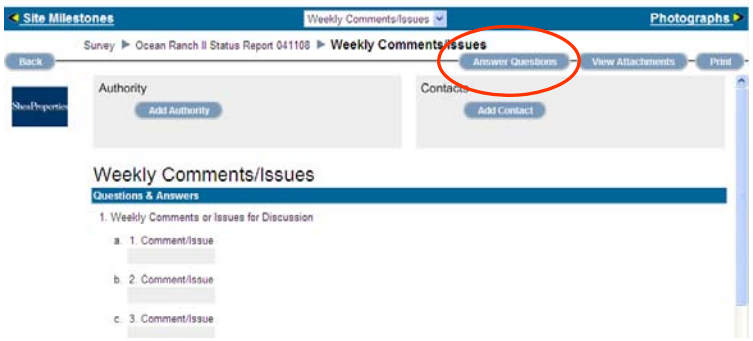


COPYING AN EXISTING SITE PHOTO SURVEY

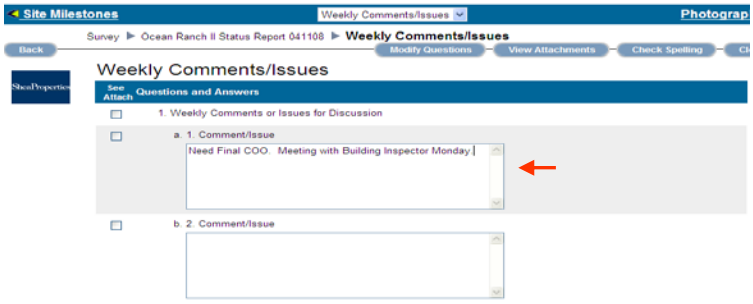
11.) Choose the Section you want to update by clicking on it. In this Example we are going to update the Weekly Comments/Issues.



12.) To update this Section Click on the “Answer Questions” button.

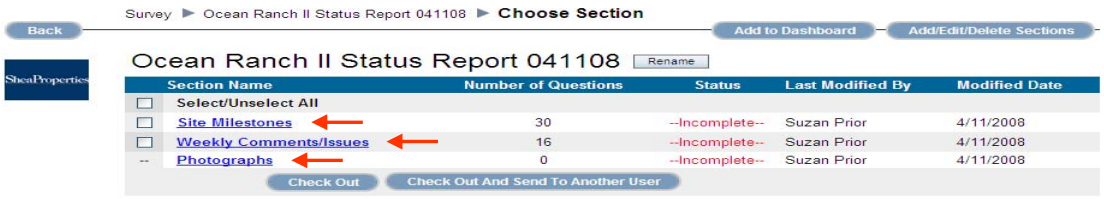


13.) This is where you would type Weekly Comments/Issues. Once you have finished updating you scroll to the very bottom and Click on the Check Box next to “Mark as Complete” and then Click “Save”. The system will ask if you want to Send and Notify or Continue. Please Continue. Do NOT Send and Notify at this point.

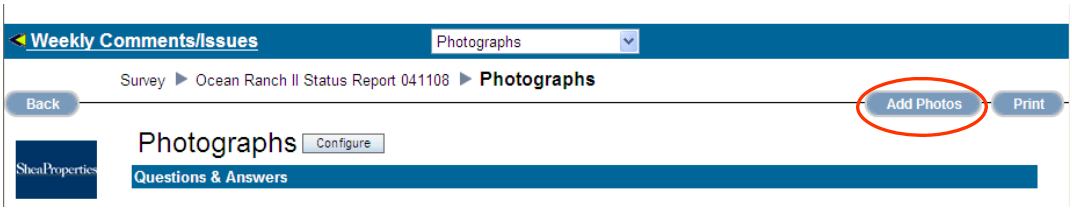


COPYING AN EXISTING SITE PHOTO SURVEY

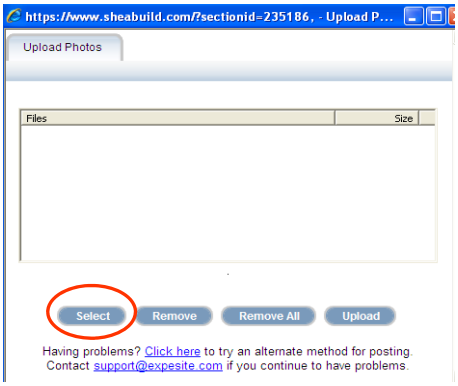
14.) Choose the Section you want to update by clicking on it. In this Example we are going to update photos.

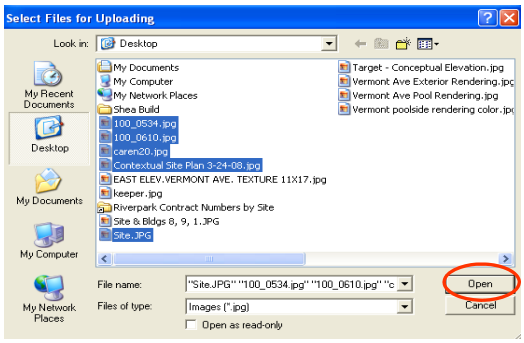


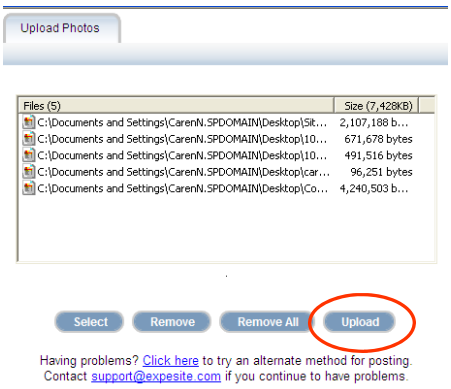
15.) To update this Section Click on the “Add Photos” button.



16.) Click on the Select button. You can choose multiple files by holding down the control key and clicking with your mouse. Then Click Open. This moves the files in to the Upload Area. Click Upload.

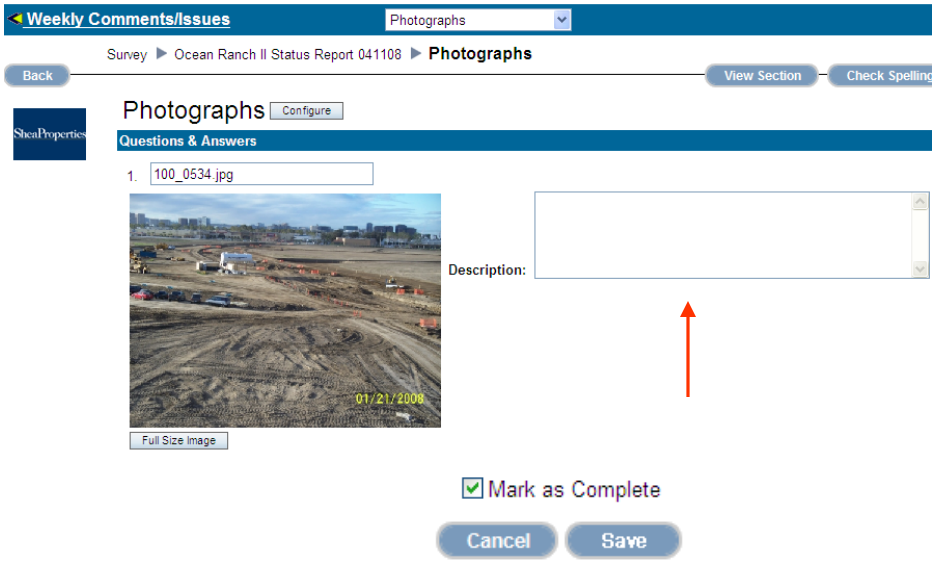




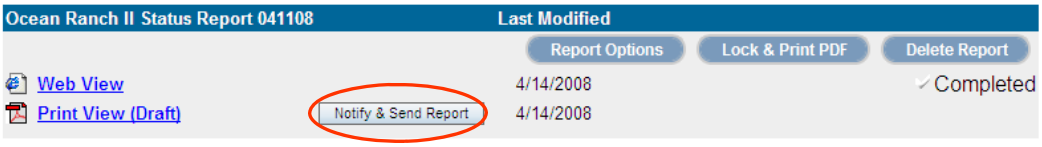


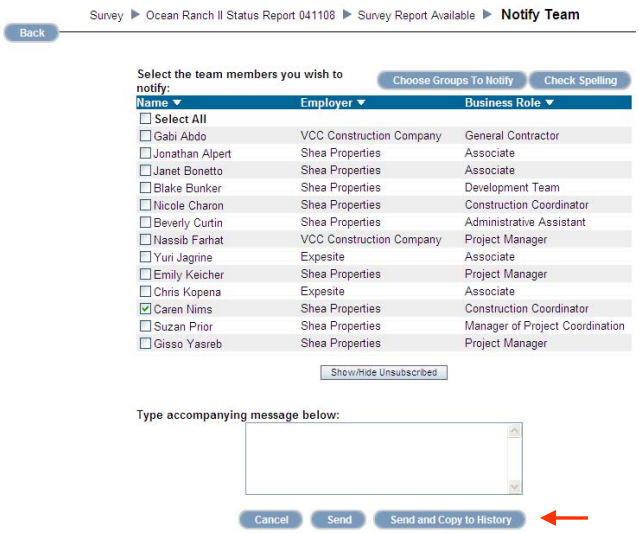
COPYING AN EXISTING SITE PHOTO SURVEY

17.) Next to each photograph is an area to enter in a description. Once you have finished scroll to the very bottom and Click on the Check Box next to “Mark as Complete” and then Click “Save”. The sys tem will ask if you want to Send and Notify or Continue. Please Continue. Do NOT Send and Notify at this point.



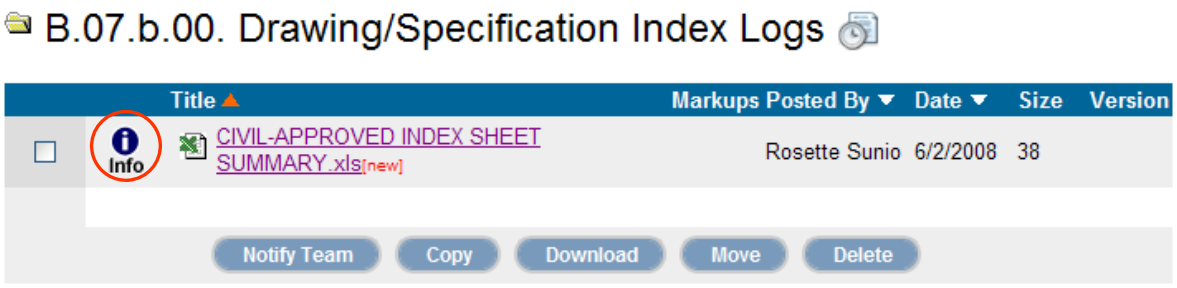
18.) To Notify and Send Click on the “Notify & Send Report” button. Select who you want to send Report to and Click on “Send and Copy to History”. This send a link and a PDF of the Report.




Survey ▶ Ocean Ranch II Status Report 041108 ▶ Survey Report Available ▶ Notify Team
Back
Select the team members you wish to notify:
Choose Groups To Notify
Check Spelling
Name
Employer
Business Role
Select All
Gabi Abdo — VCC Construction Company — General Contractor
Jonathan Alpert — Shea Properties — Associate
Janet Bonetto — Shea Properties — Associate
Blake Bunker — Shea Properties — Development Team
Nicole Charon — Shea Properties — Construction Coordinator
Beverly Curtin — Shea Properties — Administrative Assistant
Nassib Farhat — VCC Construction Company — Project Manager
Yuri Jagrine — Expesite — Associate
Emily Keicher — Shea Properties — Project Manager
Chris Kopena — Expesite — Associate
Caren Nims — Shea Properties — Construction Coordinator
Suzan Prior — Shea Properties — Manager of Project Coordination
Gisso Yasreb — Shea Properties — Project Manager
Show/Hide Unsubscribed
Type accompanying message below:
Cancel
Send
Send and Copy to History

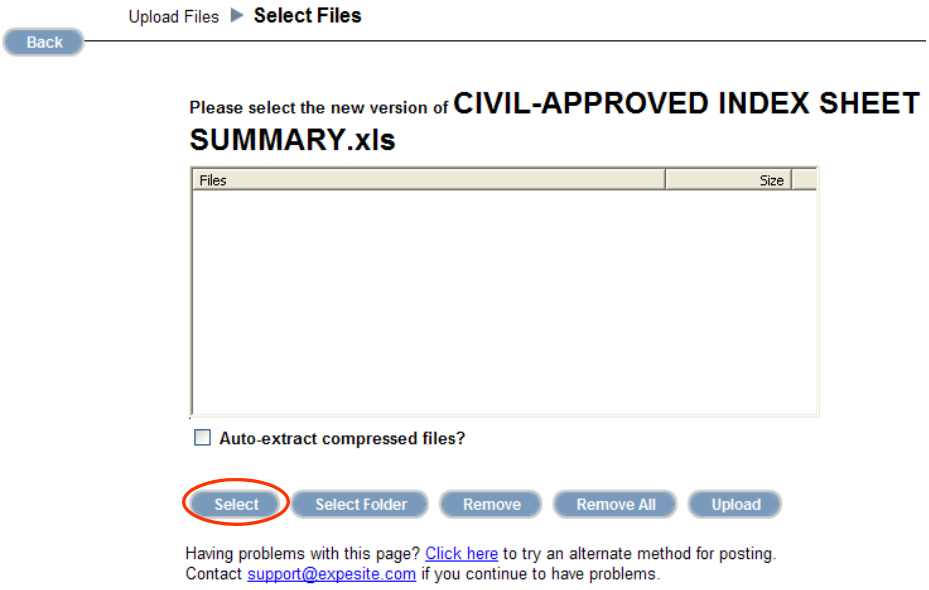
UPLOADING A REVISED DOCUMENT

1.) To upload a revised version of a document click on the blue info icon to the left of the document you want to replace.



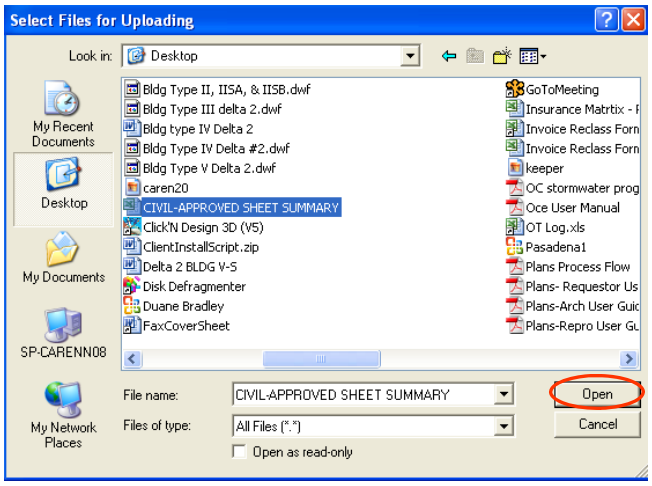
2.) Click on Upload New Version.

3.) Click on Select to choose the new version you want to upload.



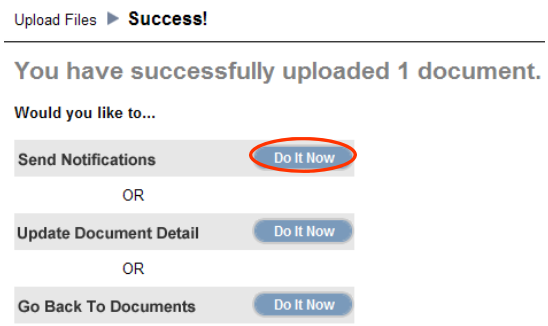
UPLOADING A REVISED DOCUMENT

4.) Click on the new document version you want to upload from your computer and click the “Open” button.



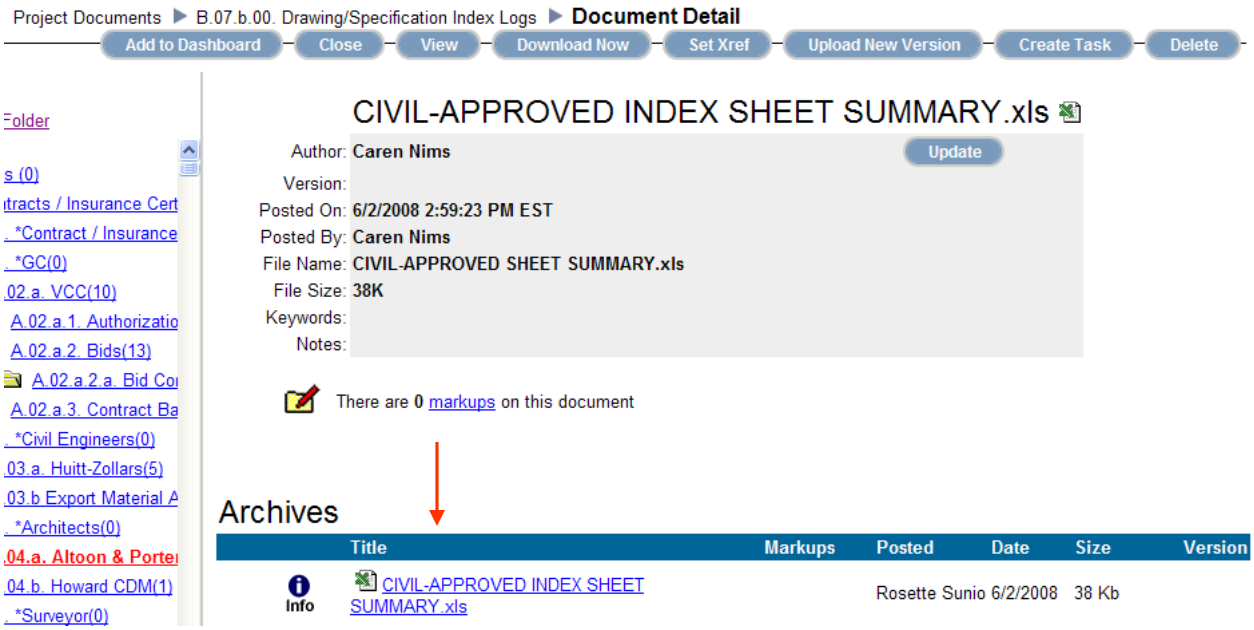
5.) Once you have clicked Open it moves the document down to the upload dialog box. Click on the “Upload” button.

6.) The system will automatically ask you whether you want to send a Notification. Click on “Do It Now” and send a notification to the team that a revised Drawing Log has been uploaded.



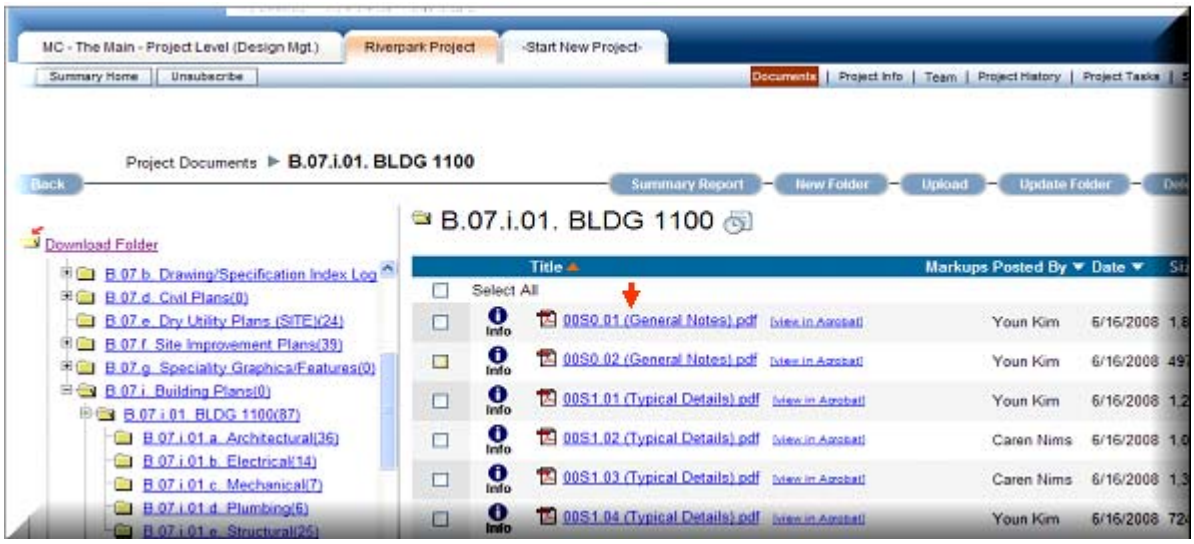
UPLOADING A REVISED DOCUMENT

7.) Once your notification is sent it will bring you back to the documents area. If you click on the Blue Info button again you will see the archived older version below.

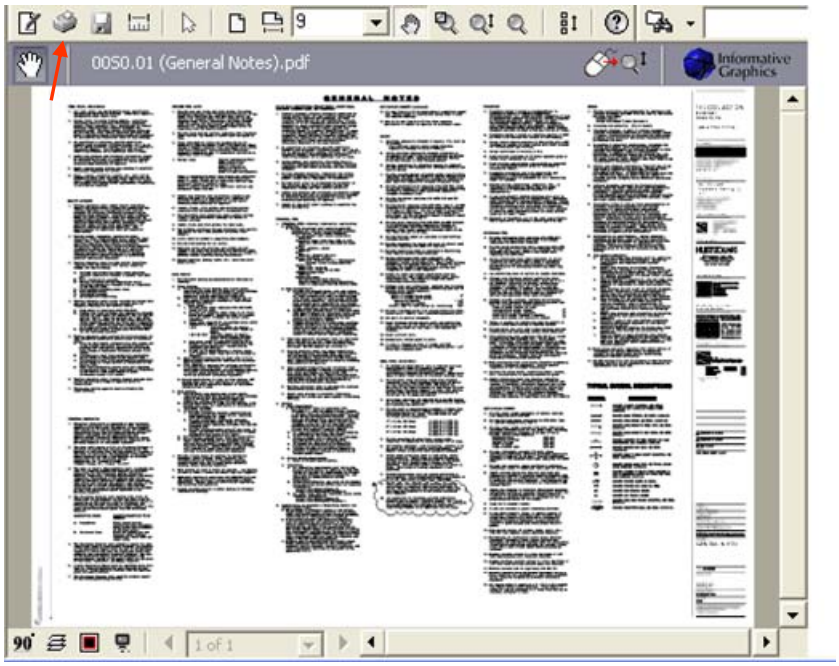


INTERNAL USERS GUIDE:
PRINTING PLANS FROM SHEABUILD TO THE OCE PLOTTER/PRINTER

1.) Click on the file to open it for printing.

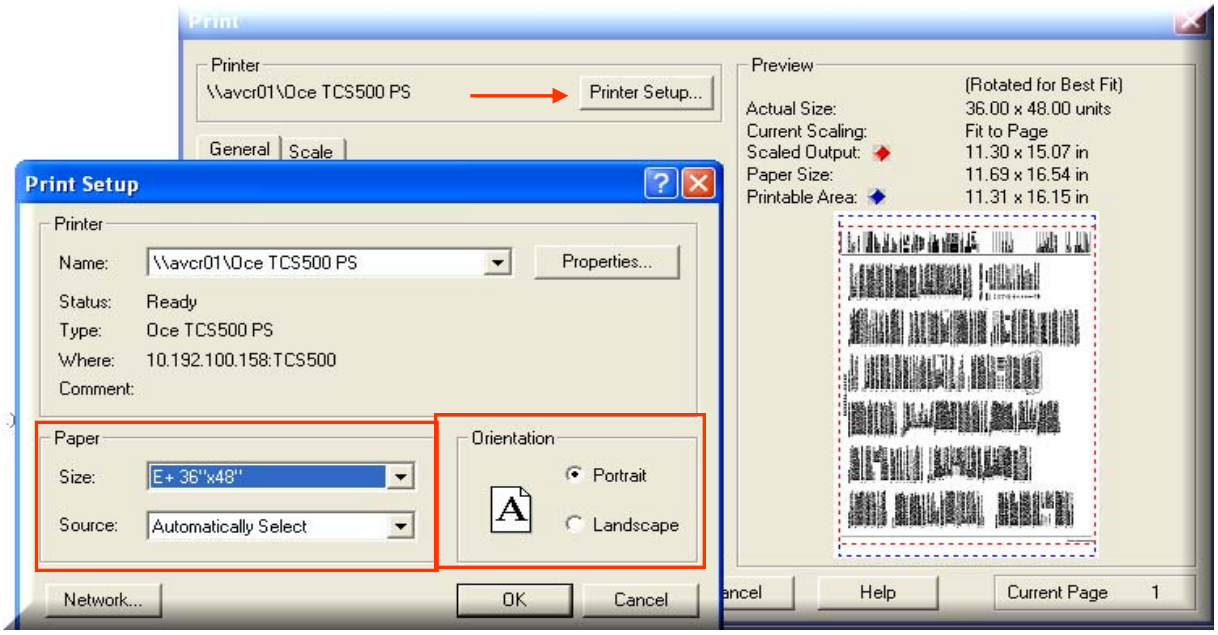


2.) Once the files opens—click the print icon and select print.

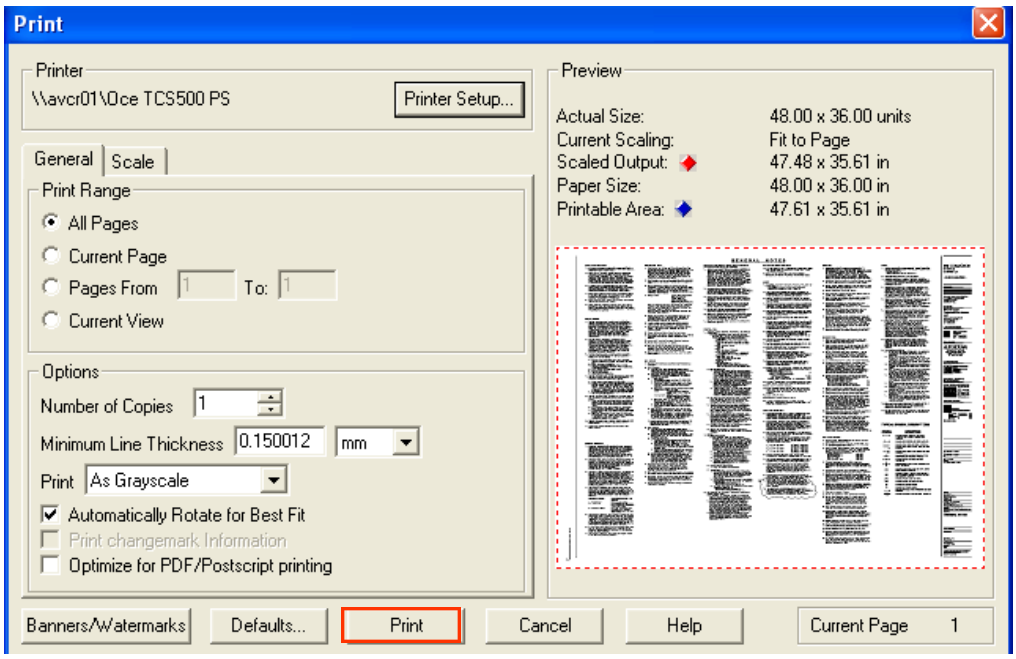


INTERNAL USERS GUIDE:
PRINTING PLANS FROM SHEABUILD TO THE OCE PLOTTER/PRINTER

3.) Click on Printer Setup and then the drop down list of printers to select the Oce TCS500PS. Then you can select paper size and source. Source should be left on Automatically Select. You will need to select orientation (portrait or landscape). After you have selected printer, paper size, source and orientation click Ok.



4.) Click on Print.

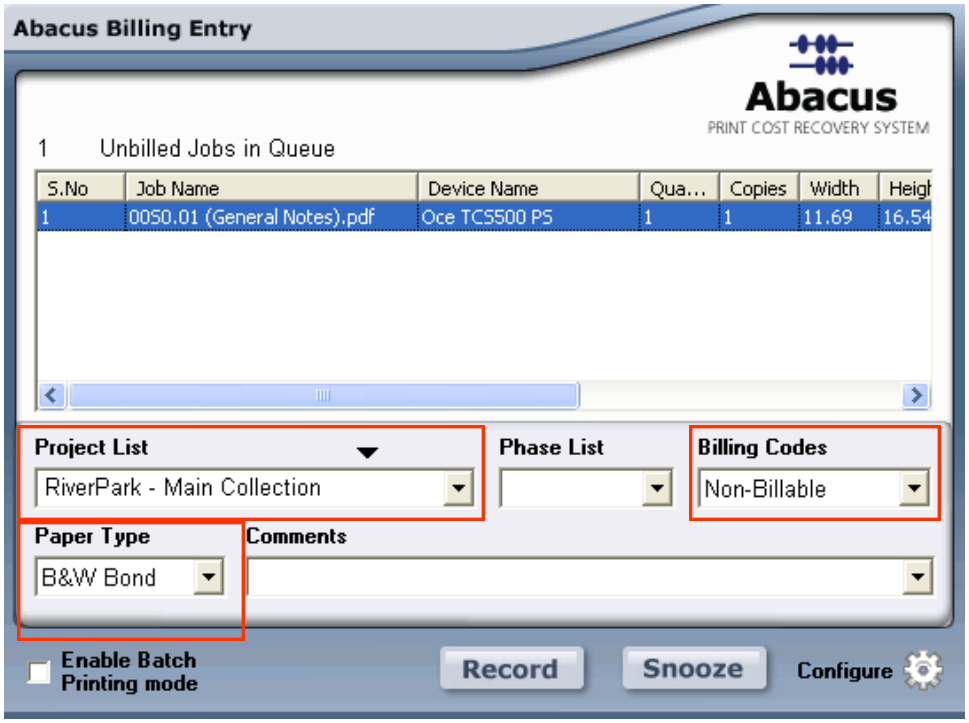


INTERNAL USERS GUIDE:
PRINTING PLANS FROM SHEABUILD TO THE OCE PLOTTER/PRINTER

5.) The Abacus Billing Entry form will appear. There are three things that you will need to make sure are filled out. From the project list select your project from the drop down list. From paper type click on the drop down list.

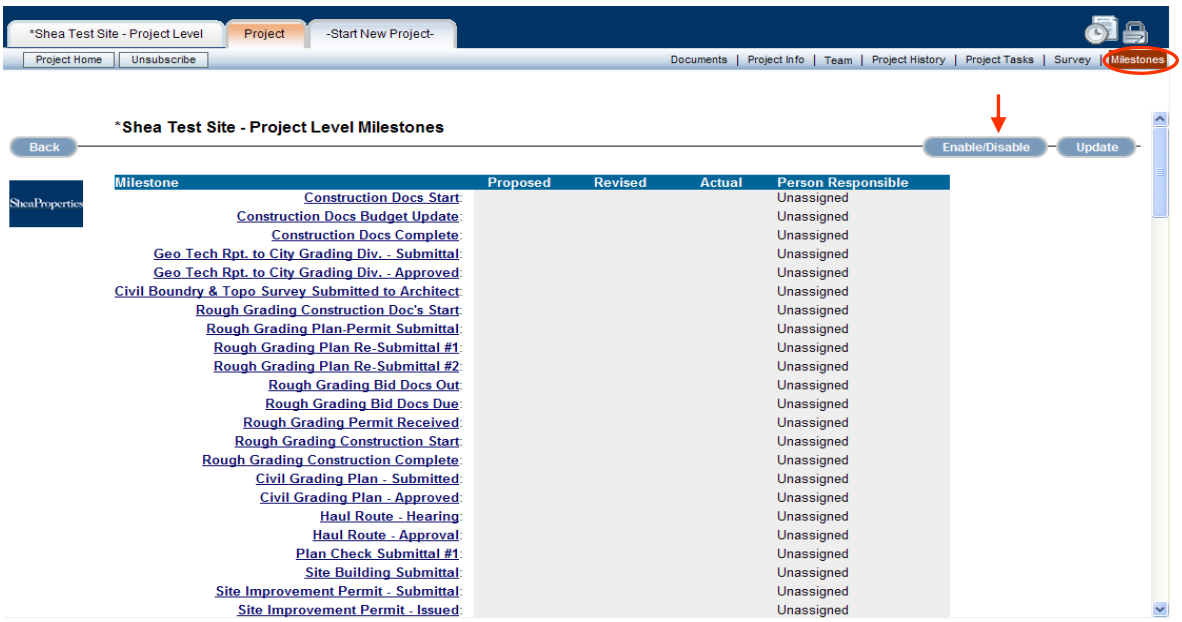
B & W Bond is the standard paper type you will use.

From Billing Codes you would only Select Billable if it was a Third Party other than Shea that you were billing for the print job. For example a Tenant. All others please select Non-Billable.

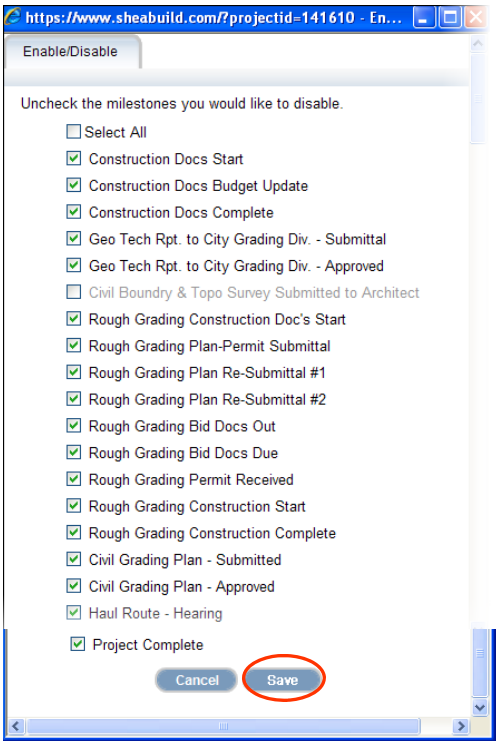


Managing Project Milestones within SheaBuild

1.) Once in the appropriate project click on Milestones. Click Enable/Disable to bring up a complete list of Milestones to Choose from. You can print this list by right clicking and selecting print. I would sit down with your Project Manager and choose the Milestones that he or she wants to track. Once that has been decided you can go in and disable the Milestones that you don't want to track. This is done by clicking on the Enable/Disable button.


*Shea Test Site - Project Level
Project
-Start New Project-
Project Home
Unsubscribe
Documents | Project Info | Team | Project History | Project Tasks | Survey | Milestones
*Shea Test Site - Project Level Milestones
Back
Enable/Disable
Update
Milestone
Proposed
Revised
Actual
Person Responsible
Construction Docs Start: Unassigned
Construction Docs Budget Update: Unassigned
Construction Docs Complete: Unassigned
Geo Tech Rpt. to City Grading Div. - Submittal: Unassigned
Geo Tech Rpt. to City Grading Div. - Approved: Unassigned
Civil Boundry & Topo Survey Submitted to Architect: Unassigned
Rough Grading Construction Doc's Start: Unassigned
Rough Grading Plan-Permit Submittal: Unassigned
Rough Grading Plan Re-Submittal #1: Unassigned
Rough Grading Plan Re-Submittal #2: Unassigned
Rough Grading Bid Docs Out: Unassigned
Rough Grading Bid Docs Due: Unassigned
Rough Grading Permit Received: Unassigned
Rough Grading Construction Start: Unassigned
Rough Grading Construction Complete: Unassigned
Civil Grading Plan - Submitted: Unassigned
Civil Grading Plan - Approved: Unassigned
Haul Route - Hearing: Unassigned
Haul Route - Approval: Unassigned
Plan Check Submittal #1: Unassigned
Site Building Submittal: Unassigned
Site Improvement Permit - Submittal: Unassigned
Site Improvement Permit - Issued: Unassigned

2.) This is where you would uncheck the Milestones that you don't want to see. For example we did not want to track the Civil Boundary & Topo Survey so I have unchecked it. Now it won't show on the list above once you click Save.


https://www.sheabuild.com/?projectid=141610 - En...
Enable/Disable
Uncheck the milestones you would like to disable.
Select All
Construction Docs Start
Construction Docs Budget Update
Construction Docs Complete
Geo Tech Rpt. to City Grading Div. - Submittal
Geo Tech Rpt. to City Grading Div. - Approved
Civil Boundry & Topo Survey Submitted to Architect
Rough Grading Construction Doc's Start
Rough Grading Plan-Permit Submittal
Rough Grading Plan Re-Submittal #1
Rough Grading Plan Re-Submittal #2
Rough Grading Bid Docs Out
Rough Grading Bid Docs Due
Rough Grading Permit Received
Rough Grading Construction Start
Rough Grading Construction Complete
Civil Grading Plan - Submitted
Civil Grading Plan - Approved
Haul Route - Hearing
Project Complete
Cancel
Save

Once the milestones are established you can meet with your manager weekly or bi-weekly and make updates to the revised dates if there is a change and you can document why there was a delay. You can also enter the actual date of completion if the Milestone is completed.

** If you need a Milestone created that is not shown please contact:

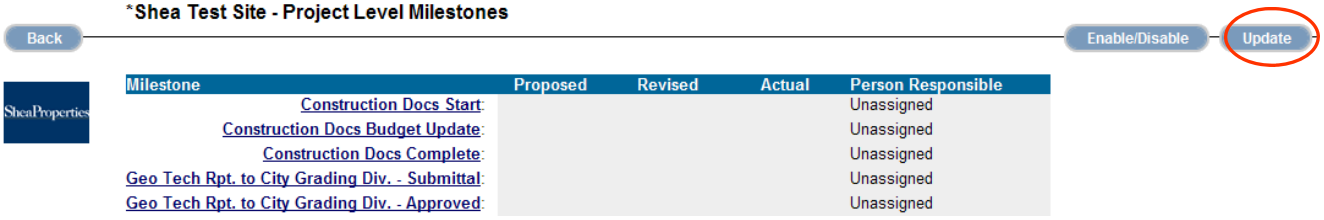
Suzan Prior
(949) 389-7213 Tel
(949) 309-8292 Cell
suzan.prior@sheaproperties.com

Or

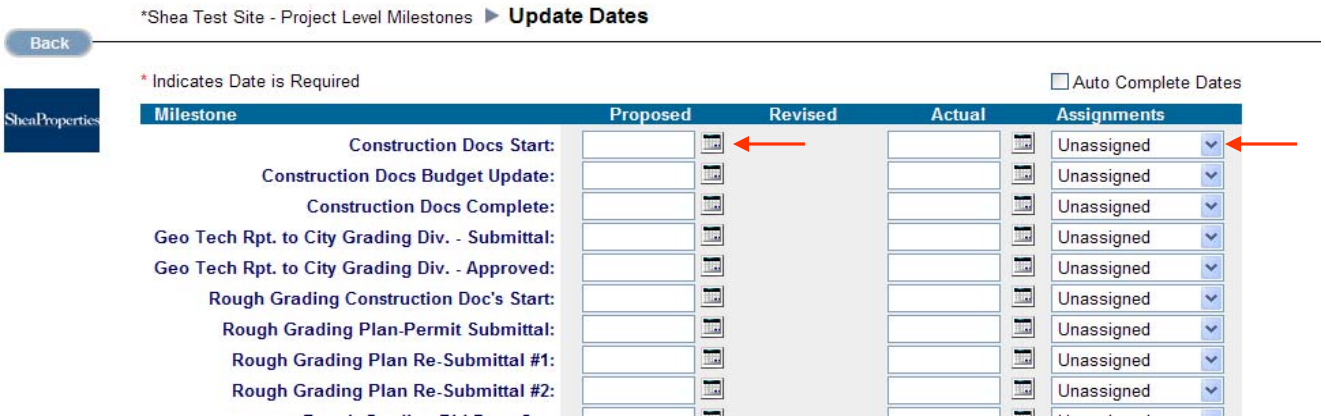
Caren Nims
(949) 389-7219 Tel
caren.nims@sheaproperties.com

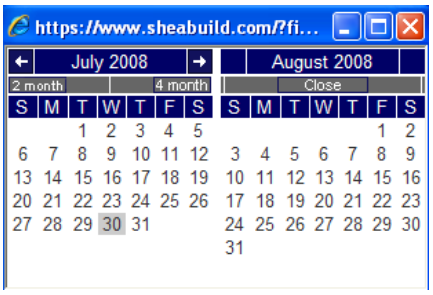
Managing Project Milestones within SheaBuild

3.) To assign the person responsible and assign a proposed due date you would click on Update.



4.) This is where you would fill in proposed schedule dates and assigned person responsible. To assign a proposed date click on the calendar icon. A calendar will appear and all you need to do is select a date. To assign the Milestone click on the drop down list and select person responsible.

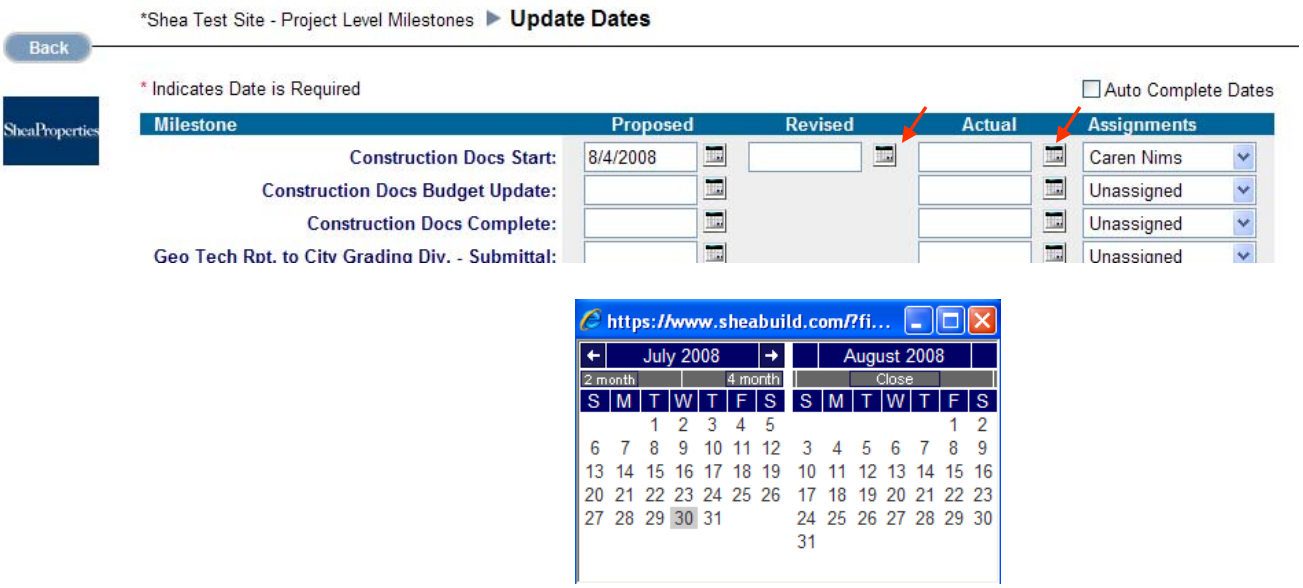

*Shea Test Site - Project Level Milestones ▶ Update Dates
Back
* Indicates Date is Required
Auto Complete Dates
Milestone
Proposed
Revised
Actual
Assignments
Construction Docs Start: Unassigned
Construction Docs Budget Update: Unassigned
Construction Docs Complete: Unassigned
Geo Tech Rpt. to City Grading Div. - Submittal: Unassigned
Geo Tech Rpt. to City Grading Div. - Approved: Unassigned
Rough Grading Construction Doc's Start: Unassigned
Rough Grading Plan-Permit Submittal: Unassigned
Rough Grading Plan Re-Submittal #1: Unassigned
Rough Grading Plan Re-Submittal #2: Unassigned



Managing Project Milestones within SheaBuild

5.) To enter in a revised date or an actual date you would click on update.

6.) This is where you would fill in a revised or actual date. To enter revised or actual date click on the calendar icon next to either the revised or actual date. A calendar will appear and all you need to do is select a date.

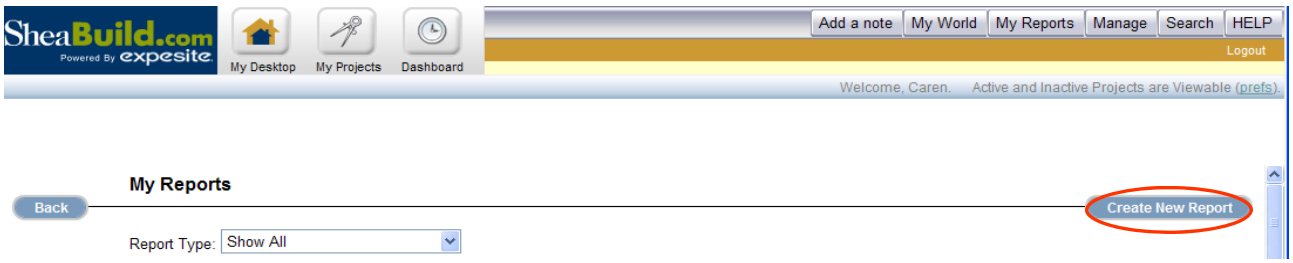


**When revising a date the system will prompt you to enter a reason for the change. Be honest. It will help evaluations at the end of the project.

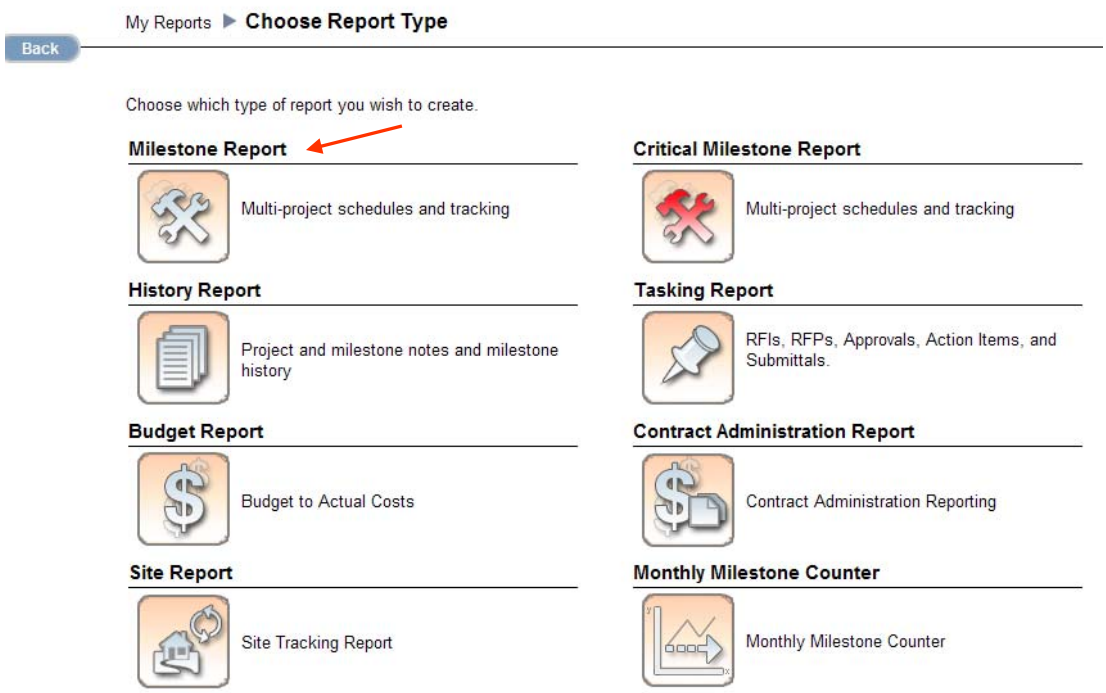
Creating a Project Milestone Report within SheaBuild

1.) To create a milestone report click on My Reports

2.) Next you click on Create New Report

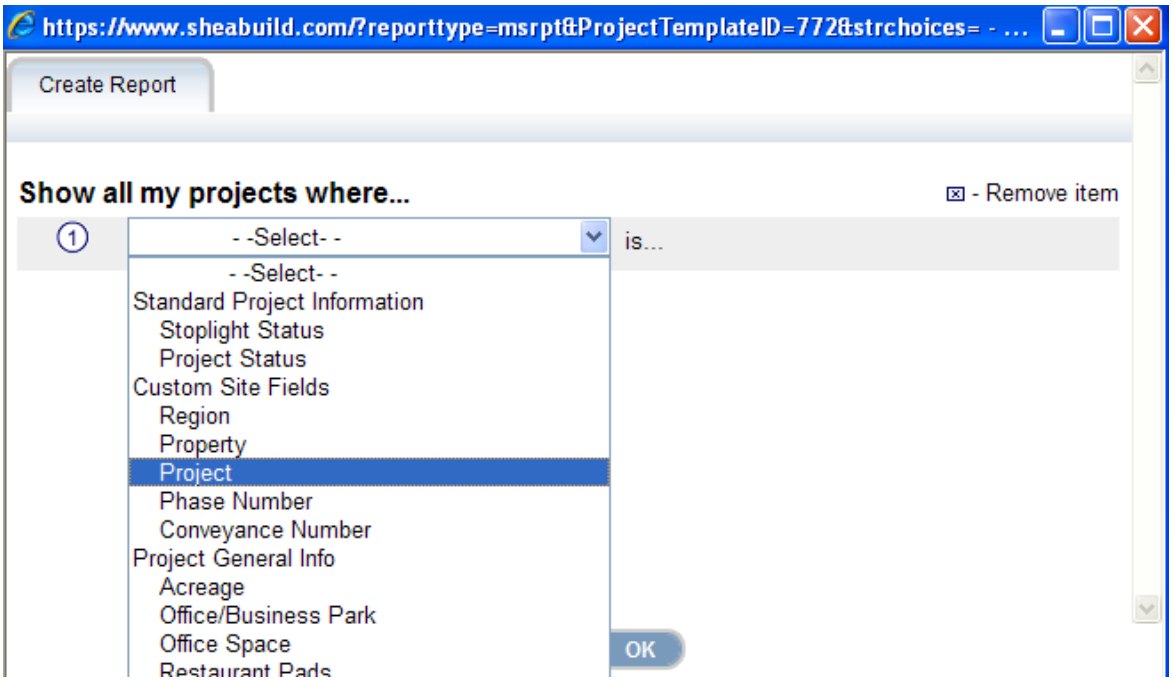


3.) Next you will choose the report type—click on Milestone Report

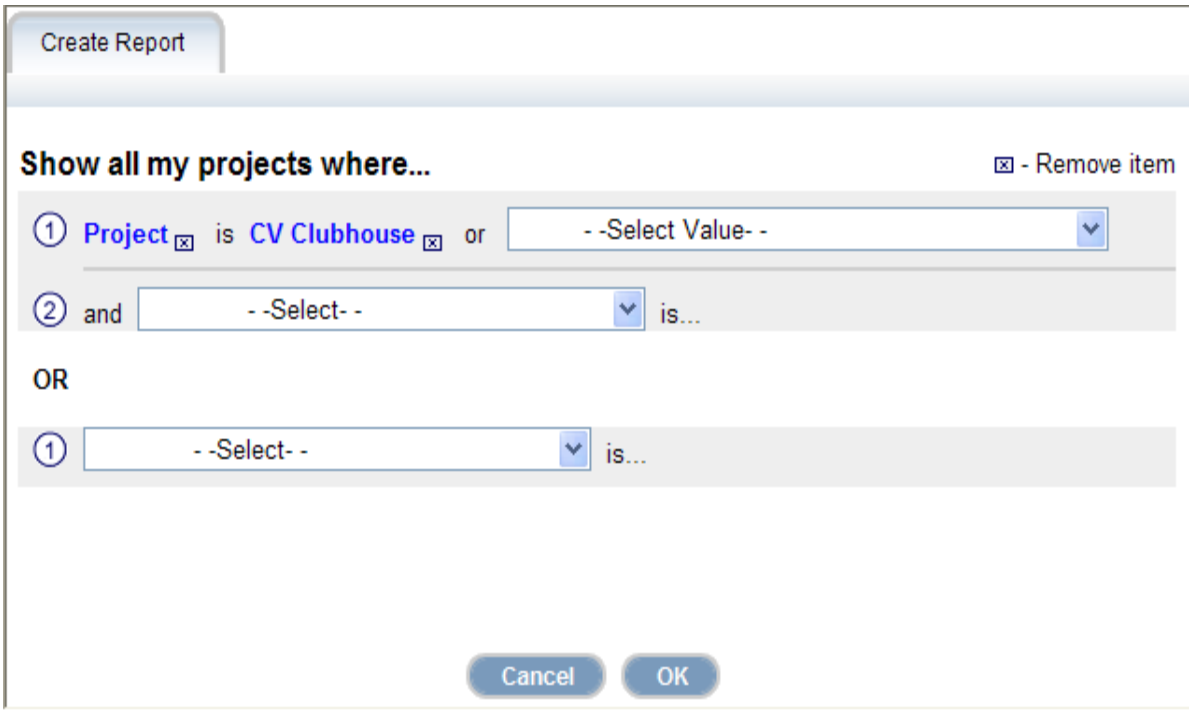


Creating a Project Milestone Report within SheaBuild

6.) A selection drop down will appear. I am going to choose “Project” for this example. Then click Ok.

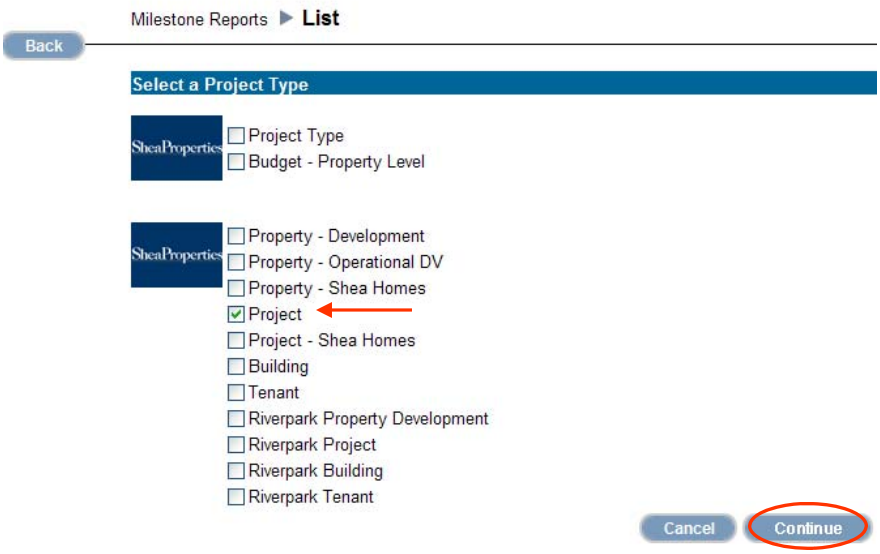


7.) I have chosen the project and now you click Ok.

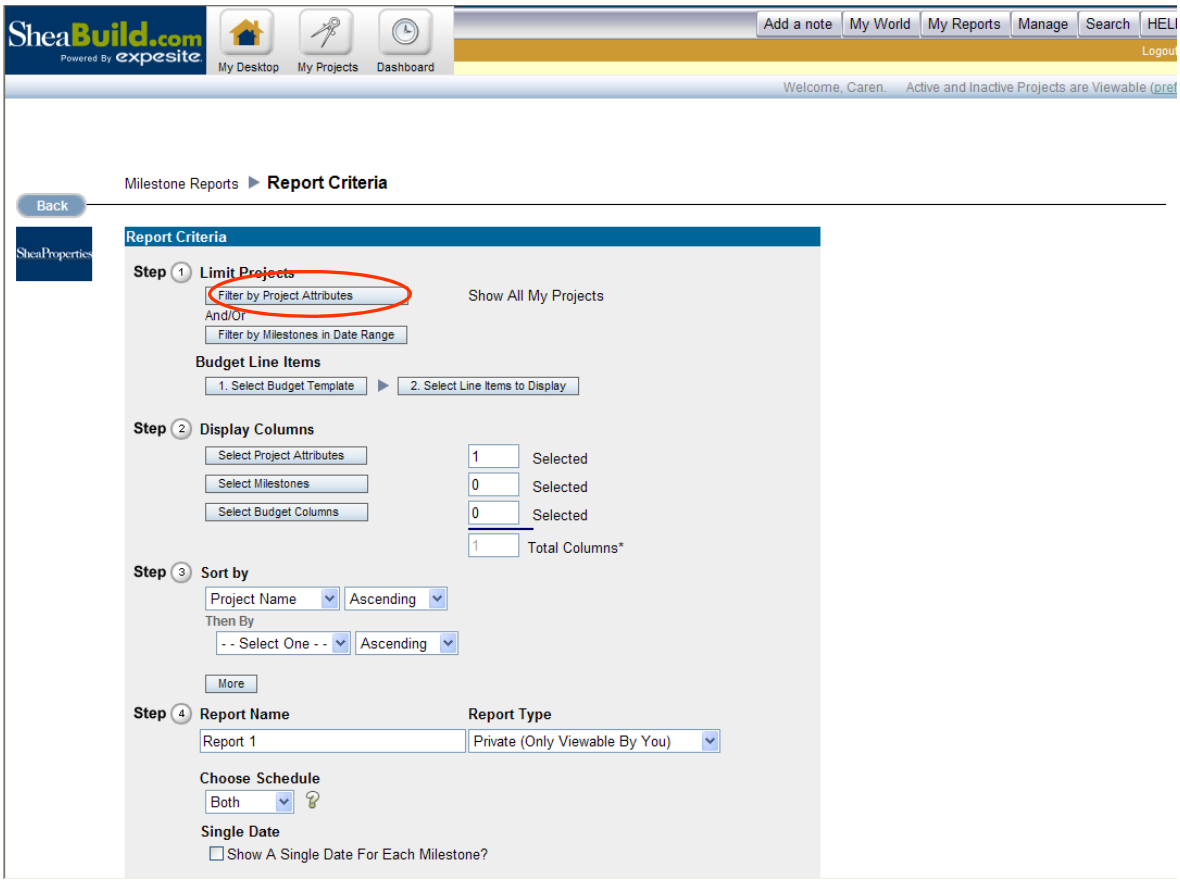


Creating a Project Milestone Report within SheaBuild

4.) Now let's select a project type. In this example I selected "Project". Click Continue.

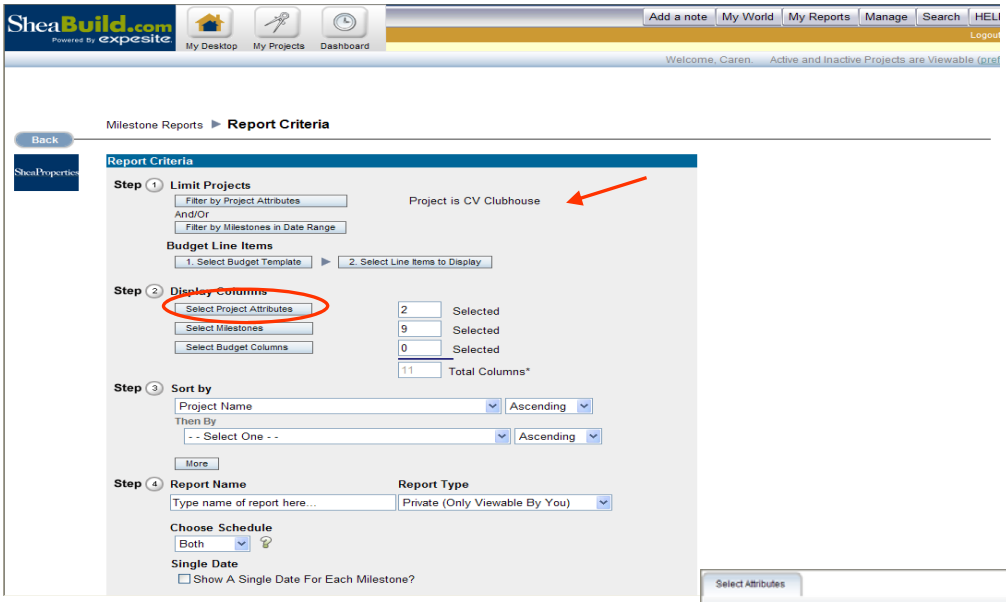


5.) Click on Filter by Project Attributes

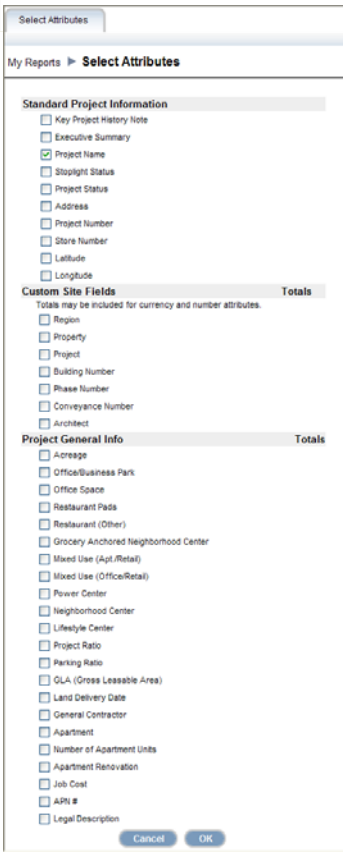


Creating a Project Milestone Report within SheaBuild

8.) You will notice that the project I selected is now showing on the right hand side of the screen. We then will want to select some project attributes.

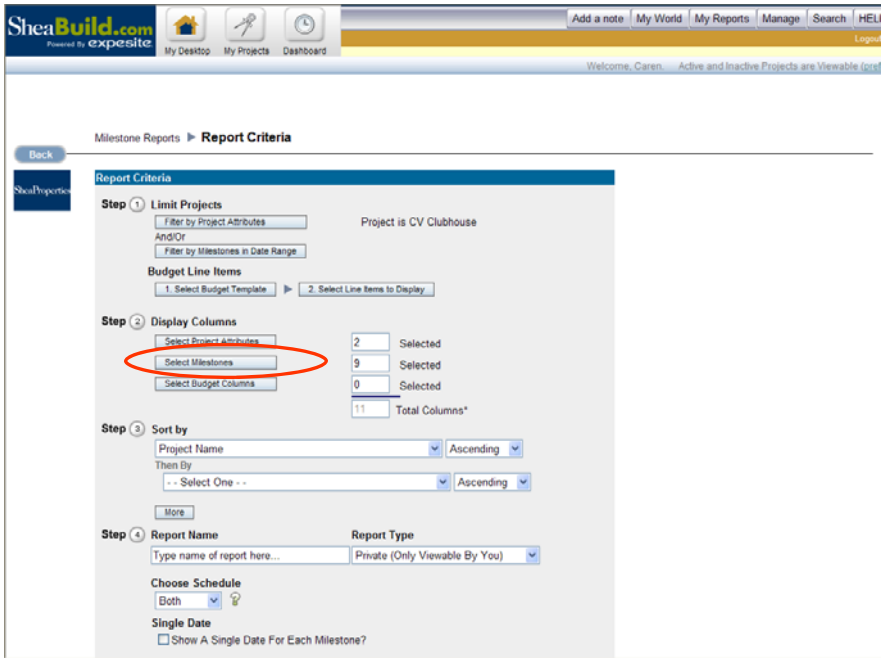


9.) A list of project information (attributes) will come up. Select what you want to see on your report.

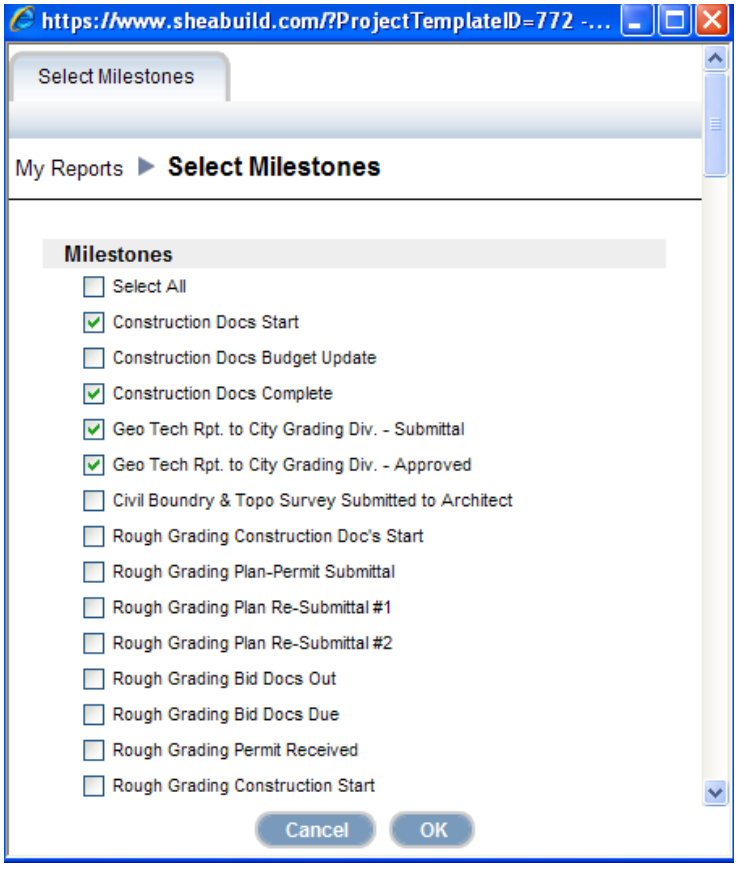


Creating a Project Milestone Report within SheaBuild

10.) Next you will click on Select Milestones.

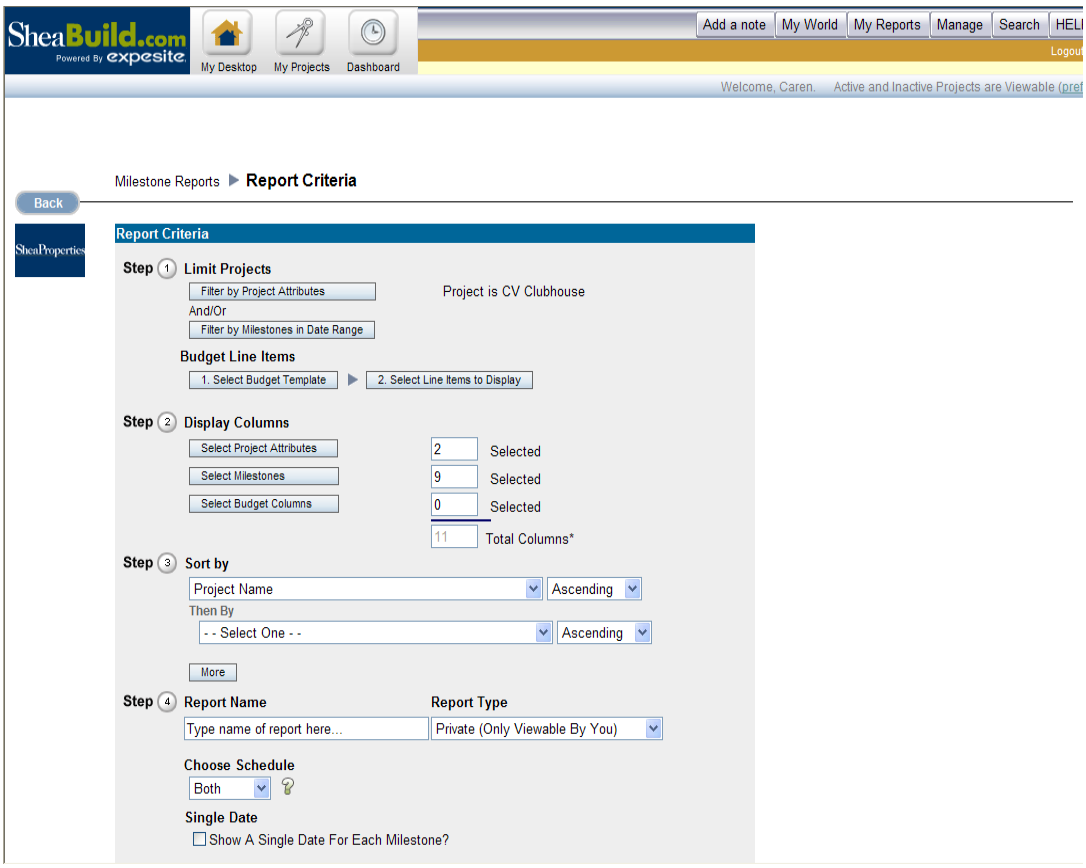


11.) A list of project milestones will come up. Select what you want to see on your report.


https://www.sheabuild.com/?ProjectTemplateID=772 -...
Select Milestones
My Reports ▶ Select Milestones
Milestones
Select All
Construction Docs Start
Construction Docs Budget Update
Construction Docs Complete
Geo Tech Rpt. to City Grading Div. - Submittal
Geo Tech Rpt. to City Grading Div. - Approved
Civil Boundry & Topo Survey Submitted to Architect
Rough Grading Construction Doc's Start
Rough Grading Plan-Permit Submittal
Rough Grading Plan Re-Submittal #1
Rough Grading Plan Re-Submittal #2
Rough Grading Bid Docs Out
Rough Grading Bid Docs Due
Rough Grading Permit Received
Rough Grading Construction Start
Cancel
OK

Creating a Project Milestone Report within SheaBuild

12.) You have different options to Sort by. You can type in the name of the report and you can make it private (only you can see) or public (everyone can see). Save and View your report.



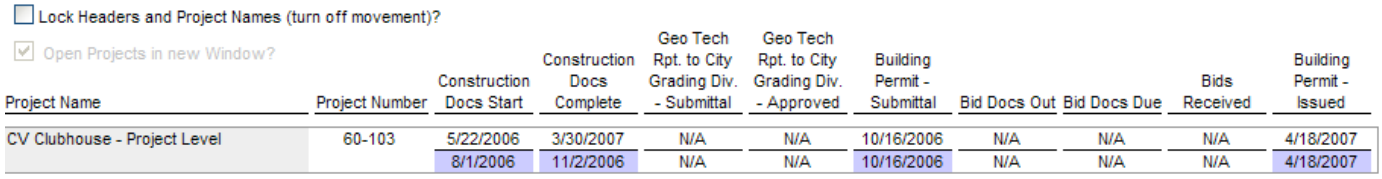
'Optimum Printing from Print View:

8 1/2 x 11 landscape - up to **11** columns

11 x 17 landscape - up to **18** columns for optimum printing

More than **28** columns will not print

13.) You can review report, print the report, and save it as a pdf if necessary.



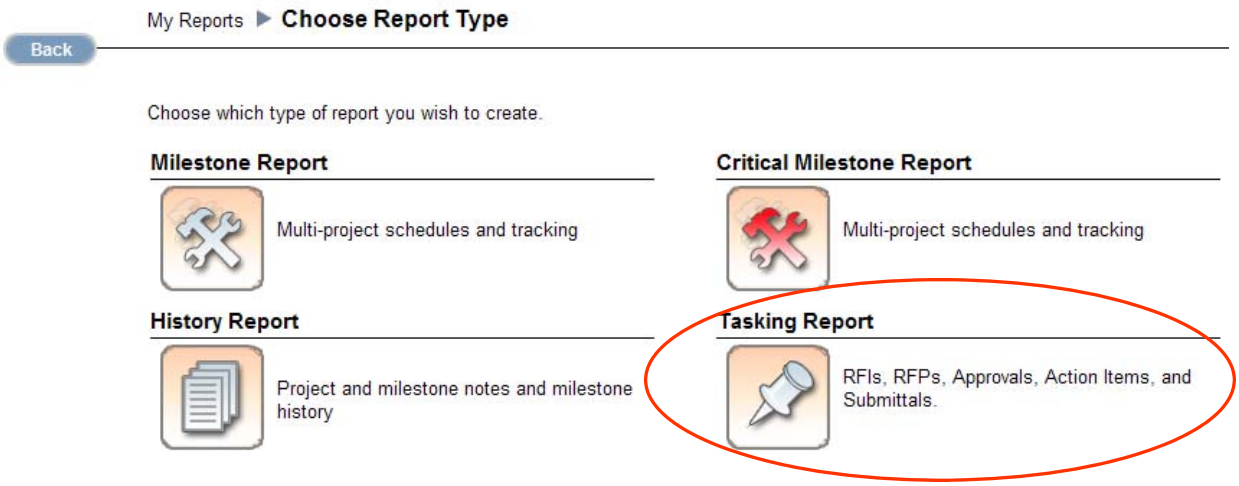
Project Name	Project Number	Construction Docs Start	Construction Docs Complete	Geo Tech Rpt. to City Grading Div. - Submittal	Geo Tech Rpt. to City Grading Div. - Approved	Building Permit - Submittal	Bid Docs Out	Bid Docs Due	Bids Received	Building Permit - Issued
CV Clubhouse - Project Level	60-103	5/22/2006	3/30/2007	N/A	N/A	10/16/2006	N/A	N/A	N/A	4/18/2007
		8/1/2006	11/2/2006	N/A	N/A	10/16/2006	N/A	N/A	N/A	4/18/2007

Managing RFIs, RFPs, Approvals, Action Items & Submittals within SheaBuild

1.) To manage RFIs, RFPs, Approvals and Action Items and Submittals you would want to use the SheaBuild Report features to create a custom report for your specific project. To begin click on My Reports located in the upper right hand side of your screen.

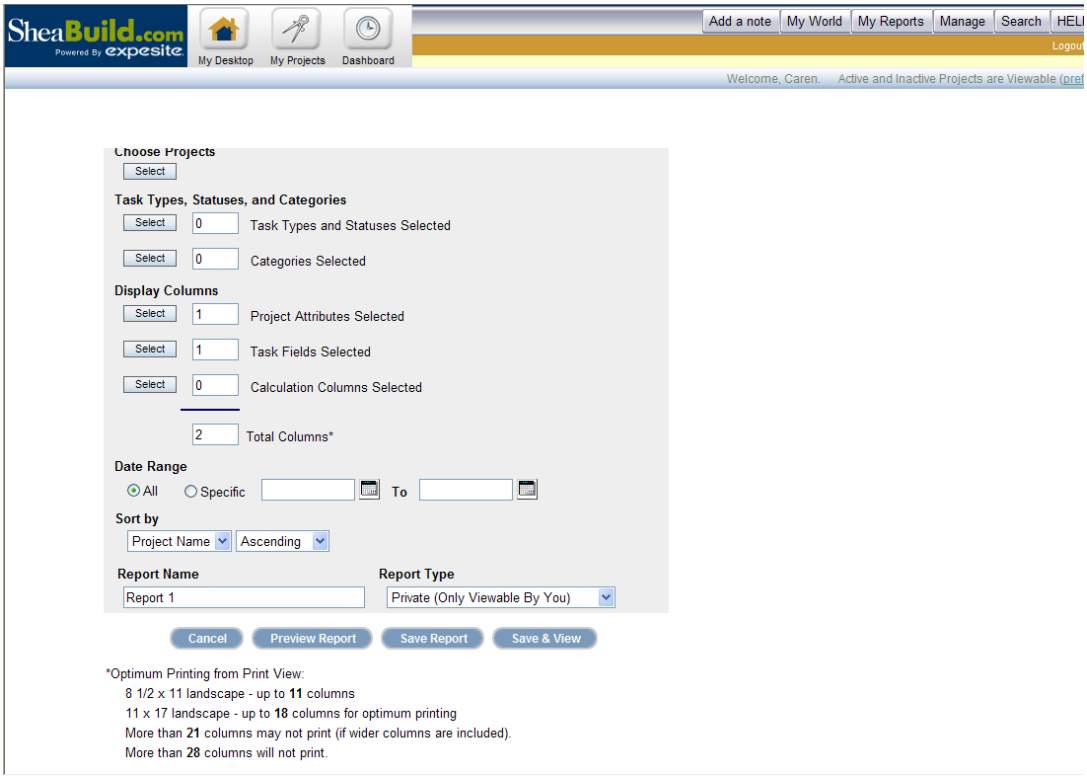
2.) Click on Create New Report.

3.) Reporting for all RFIs, RFPs, Approvals, Action Items and Submittals are all going to be through a Tasking Report.

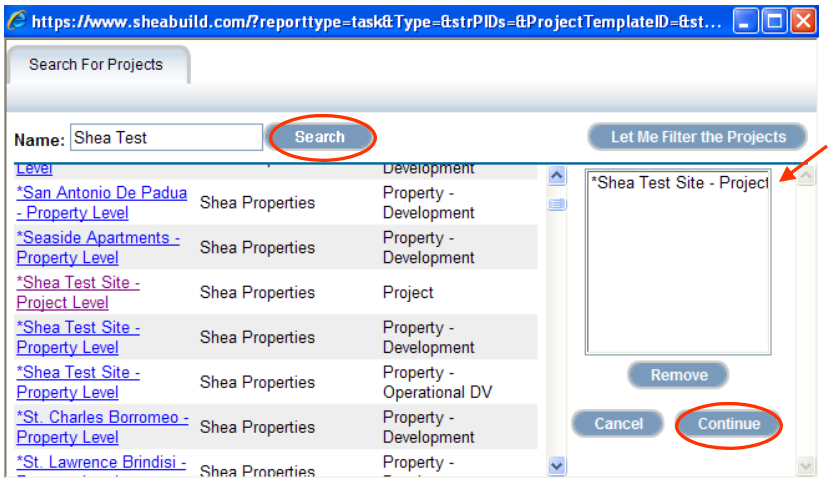

My Reports ▶ Choose Report Type
Back
Choose which type of report you wish to create.
Milestone Report
Multi-project schedules and tracking
Critical Milestone Report
Multi-project schedules and tracking
History Report
Project and milestone notes and milestone history
Tasking Report
RFIs, RFPs, Approvals, Action Items, and Submittals.

Managing RFIs, RFPs, Approvals, Action Items & Submittals within SheaBuild

4.) Once you have clicked on Tasking Report this page will come up. We start by choosing the project we want our report for. Click on Choose Projects first and type in project name to search for - as seen below.

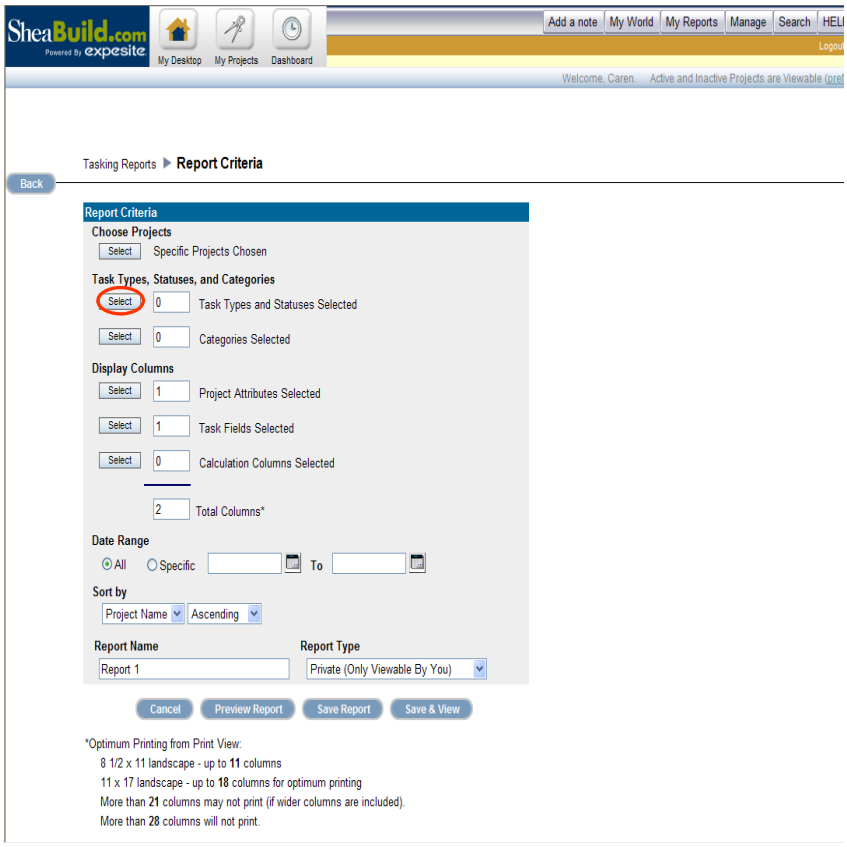


5.) Select project and this moves project in to the selection box to the right. Click the “Continue” button.

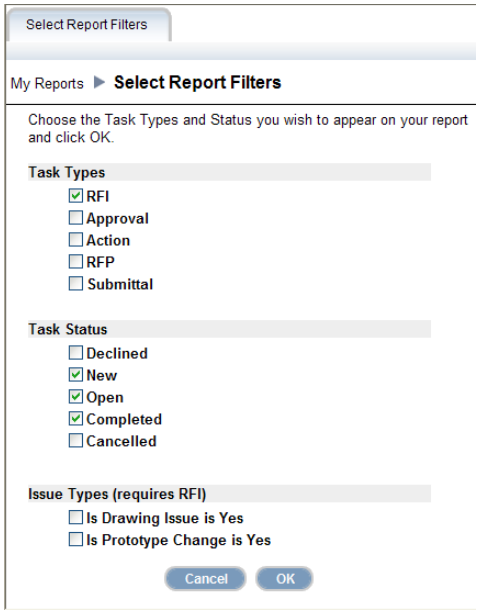


Managing RFIs, RFPs, Approvals, Action Items & Submittals within SheaBuild

6.) Now we are going to select the task type we want the report to be for. Click on Select Task Types.

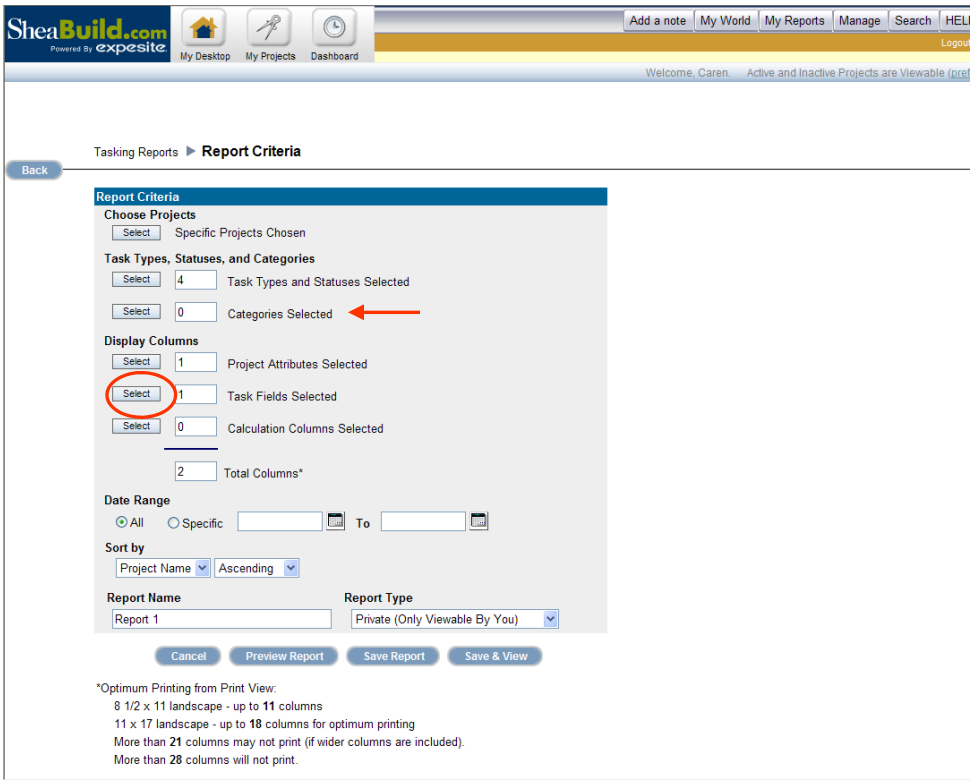


7.) For this example I choose RFI's and I want to see all New, Open & Completed RFI's.

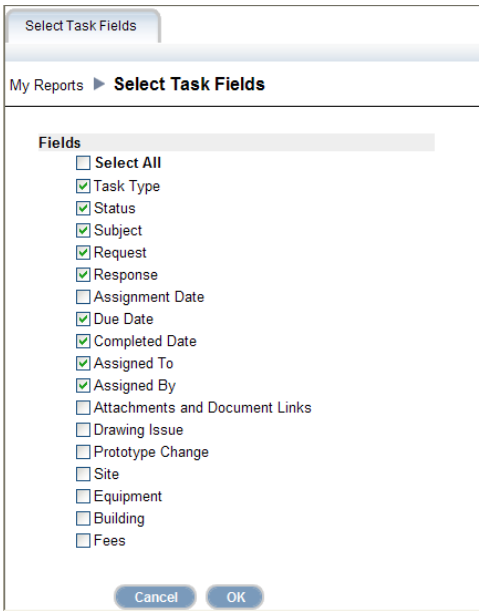


Managing RFIs, RFPs, Approvals, Action Items & Submittals within SheaBuild

8.) You can select Categories or leave it blank and it will pull all categories on the list. You can select Project Attributes which is project information. Next we will select the Task Fields we want to show up on our report. Click on Select Task Fields.

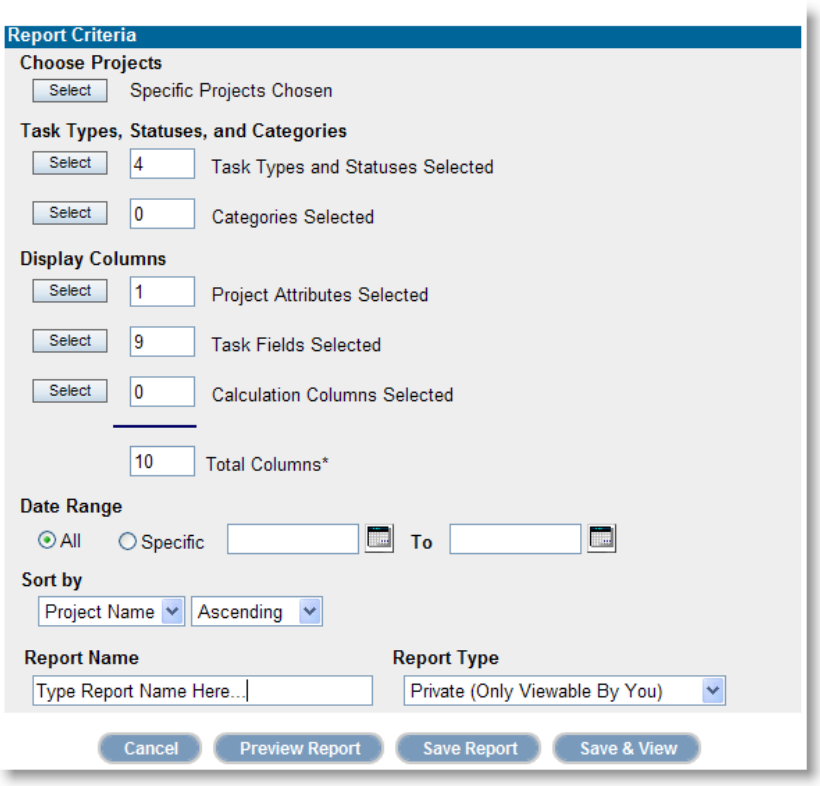


9.) I selected everything that I wanted to see on my RFI Report.

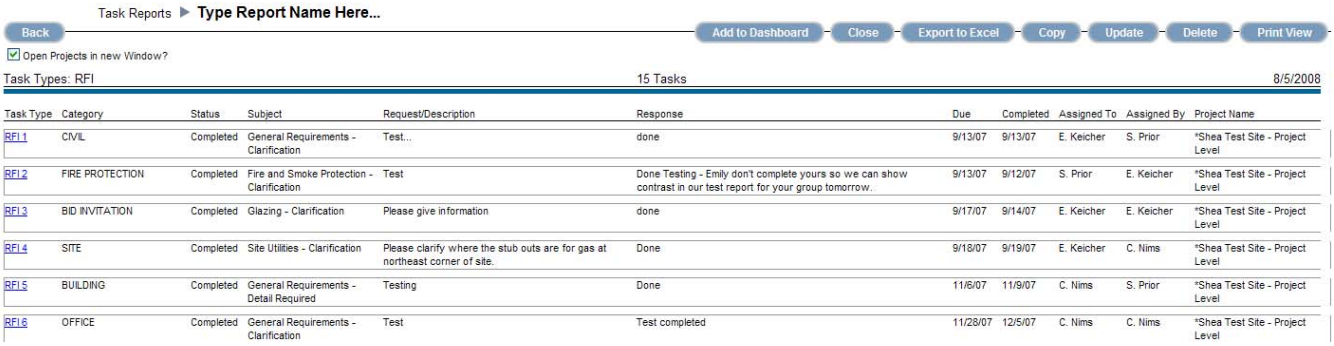


Managing RFIs, RFPs, Approvals, Action Items & Submittals within SheaBuild

10.) The Calculation Column will calculate number of days task is open. This is optional. You can sort by different criteria. Type the name of your report. Your report can be Private (only viewable by you) or you can make it public so that others on your team can view it as well. Click Save and View.



11.) Here is what my RFI report looks like. You can print it, send it as a pdf etc… You can create this report for RFP's, Approvals, Submittals and Action Items as well.



Task Reports ▶ **Type Report Name Here...**

Back | Add to Dashboard | Close | Export to Excel | Copy | Update | Delete | Print View

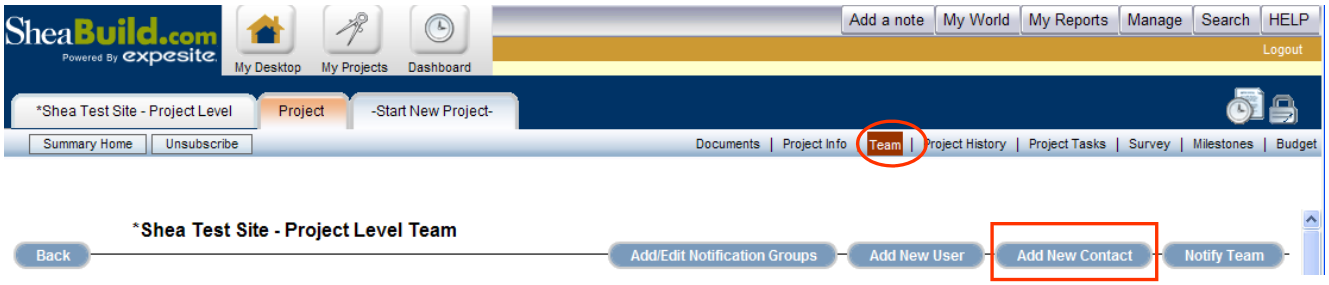
Open Projects in new Window?

Task Types: RFI — 15 Tasks — 8/5/2008

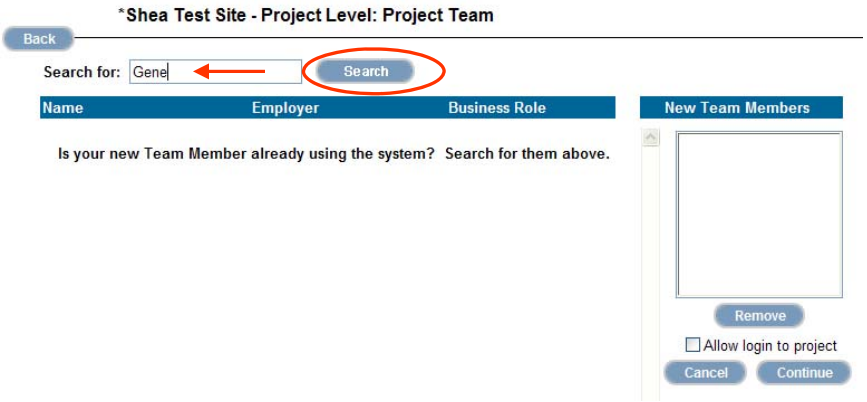
Task Type	Category	Status	Subject	Request/Description	Response	Due	Completed	Assigned To	Assigned By	Project Name
RFI 1	CIVIL	Completed	General Requirements - Clarification	Test...	done	9/13/07	9/13/07	E. Keicher	S. Prior	*Shea Test Site - Project Level
RFI 2	FIRE PROTECTION	Completed	Fire and Smoke Protection - Clarification	Test	Done Testing - Emily don't complete yours so we can show contrast in our test report for your group tomorrow.	9/13/07	9/12/07	S. Prior	E. Keicher	*Shea Test Site - Project Level
RFI 3	BID INVITATION	Completed	Glazing - Clarification	Please give information	done	9/17/07	9/14/07	E. Keicher	E. Keicher	*Shea Test Site - Project Level
RFI 4	SITE	Completed	Site Utilities - Clarification	Please clarify where the stub outs are for gas at northeast corner of site.	Done	9/18/07	9/19/07	E. Keicher	C. Nims	*Shea Test Site - Project Level
RFI 5	BUILDING	Completed	General Requirements - Detail Required	Testing	Done	11/6/07	11/9/07	C. Nims	S. Prior	*Shea Test Site - Project Level
RFI 6	OFFICE	Completed	General Requirements - Clarification	Test	Test completed	11/28/07	12/5/07	C. Nims	C. Nims	*Shea Test Site - Project Level

Adding a New Contact to SheaBuild

1.) You can add a contact to any level within SheaBuild by choosing the correct Property, Project, Building and/or Tenant Level. Once you have selected your project click on Team. When you are in the Team area you will click on "Add a New Contact".



2.) A search box will appear. Type in the first name of the person you want to add as a Contact. In this example I typed in the name Gene and then I clicked on Search.

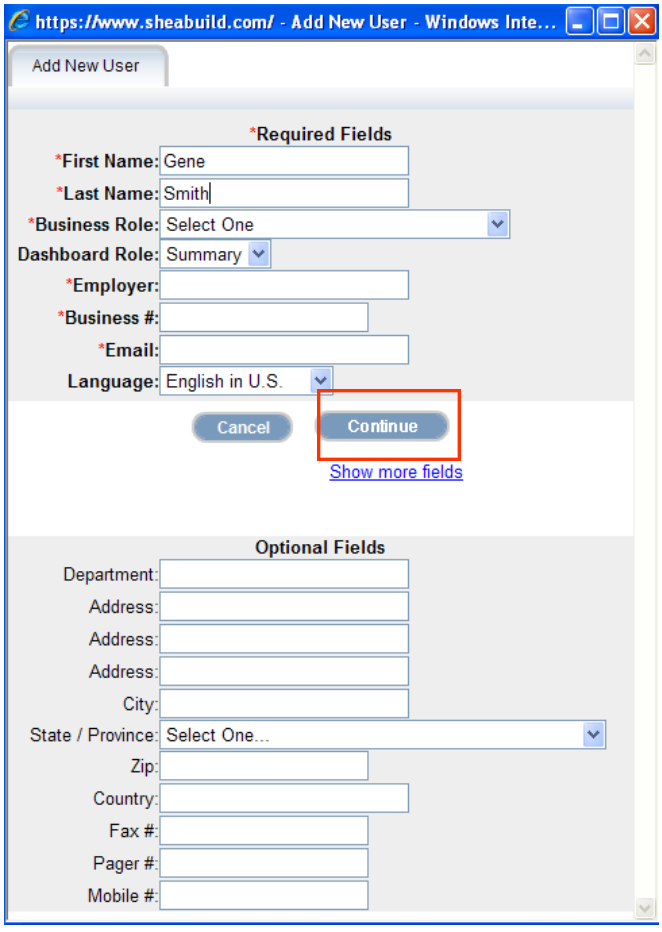


3.) A list of people should appear. If the person you want to add as a contact shows in the list all you would do is click on their name and it will move there name over in the New Team Members dialog box on the right. From there you would click continue. **Note: Please <u>do not</u> check the box Allow login to project.

Adding a New Contact to SheaBuild

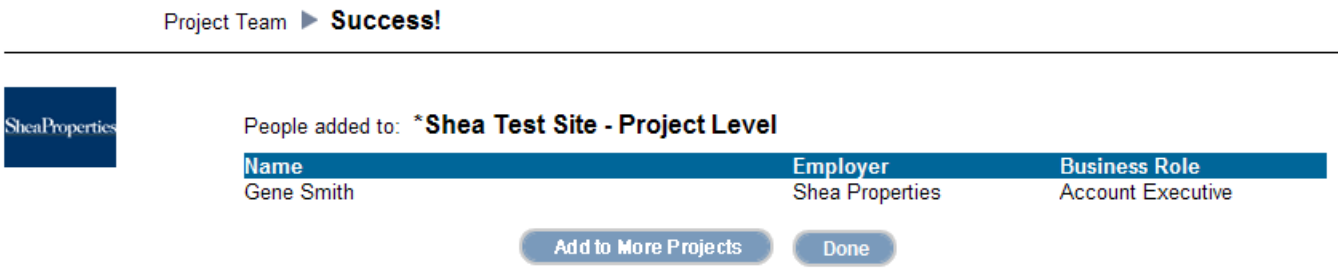
4.) If your person does not show up in the list you would click on “Add New Contact”.

5.) Add the New Contact information and then click Continue.

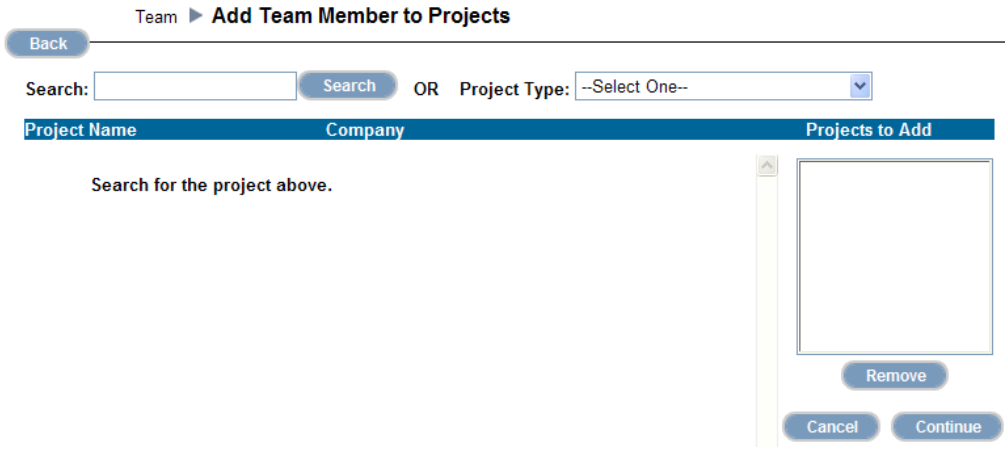


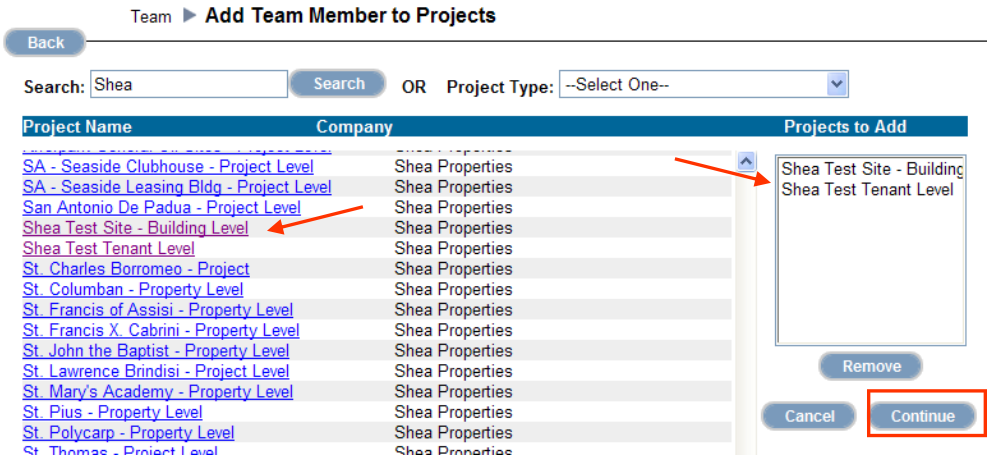
Adding a New Contact to SheaBuild

6.) Click Done if that is the only level you want to add them to as a Contact. If you want to add them to more projects you would click on “Add to More Projects”.



7.) A search screen will appear. Type the name of the project you want to add your contact to. A list of projects should appear. Select the projects you want to add them to and it will move the project names over to the Project to Add dialog box to the right and then click Continue.



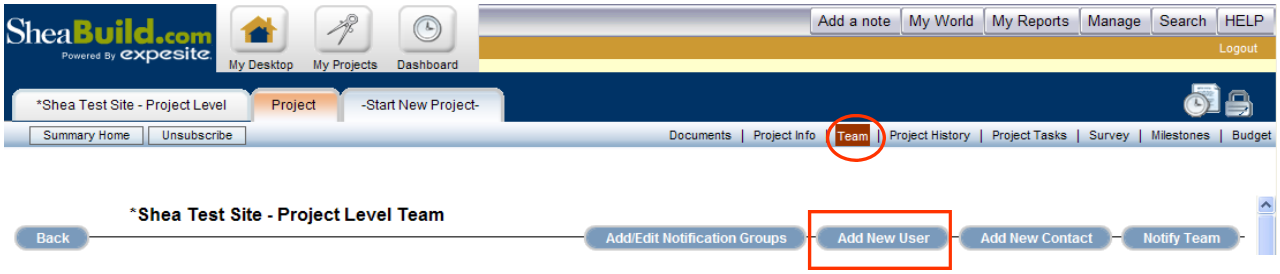

Team ▶ Add Team Member to Projects
Back
Search: Shea
Search
OR
Project Type:
--Select One--
Project Name
Company
Projects to Add
SA - Seaside Clubhouse - Project Level
SA - Seaside Leasing Bldg - Project Level
San Antonio De Padua - Project Level
Shea Test Site - Building Level
Shea Test Tenant Level
St. Charles Borromeo - Project
St. Columban - Property Level
St. Francis of Assisi - Property Level
St. Francis X. Cabrini - Property Level
St. John the Baptist - Property Level
St. Lawrence Brindisi - Project Level
St. Mary's Academy - Property Level
St. Pius - Property Level
St. Polycarp - Property Level
Shea Properties
Shea Test Site - Building
Shea Test Tenant Level
Remove
Cancel
Continue

Adding a New Contact to SheaBuild

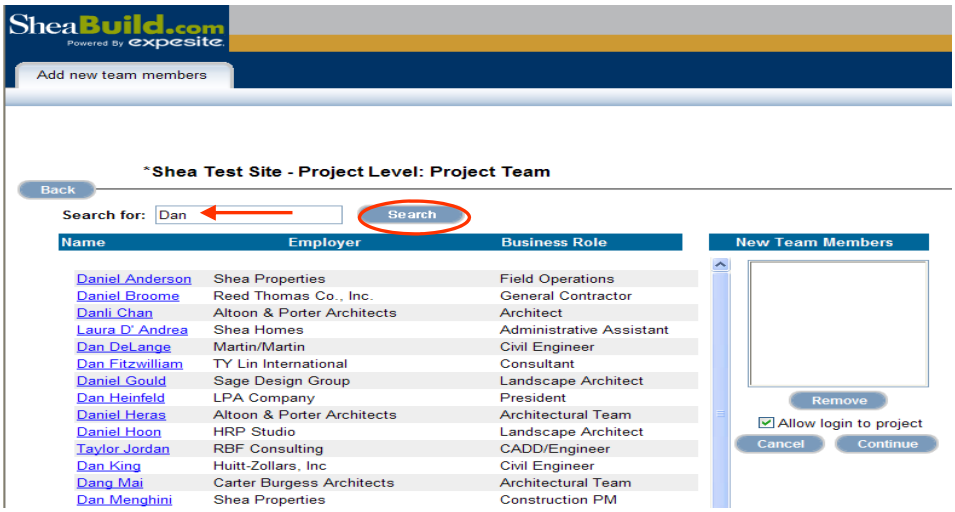
8.) Click Continue to return to the Team area.

Adding a New User to SheaBuild

1.) You can add a User to any level within SheaBuild by choosing the correct Property, Project, Building and/or Tenant level. Once you have selected your project click on Team. When you are in the Team area you will click on "Add New User".



2.) A search box will appear. Type in the first name of the person you want to add as a User. In this example I typed in the name Dan and then I clicked on Search.

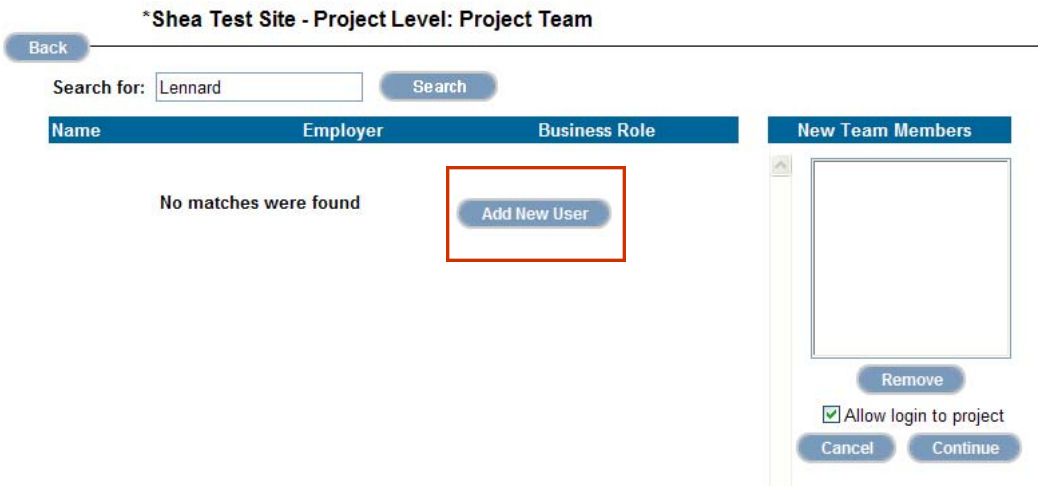

SheaBuild.com
Powered By expesite
Add new team members
*Shea Test Site - Project Level: Project Team
Back
Search for: Dan
Search
Name
Employer
Business Role
Daniel Anderson Shea Properties Field Operations
Daniel Broome Reed Thomas Co., Inc. General Contractor
Danli Chan Altoon & Porter Architects Architect
Laura D' Andrea Shea Homes Administrative Assistant
Dan DeLange Martin/Martin Civil Engineer
Dan Fitzwilliam TY Lin International Consultant
Daniel Gould Sage Design Group Landscape Architect
Dan Heinfeld LPA Company President
Daniel Heras Altoon & Porter Architects Architectural Team
Daniel Hoon HRP Studio Landscape Architect
Taylor Jordan RBF Consulting CADD/Engineer
Dan King Huitt-Zollars, Inc Civil Engineer
Dang Mai Carter Burgess Architects Architectural Team
Dan Menghini Shea Properties Construction PM
New Team Members
Remove
Allow login to project
Cancel
Continue

3.) A list of people should appear. If the person you want to add as a User shows in the list all you would do is click on their name and it will move over in the New Team Members dialog box on the right. From there you would click continue. When adding a User you would want to Allow login to project.

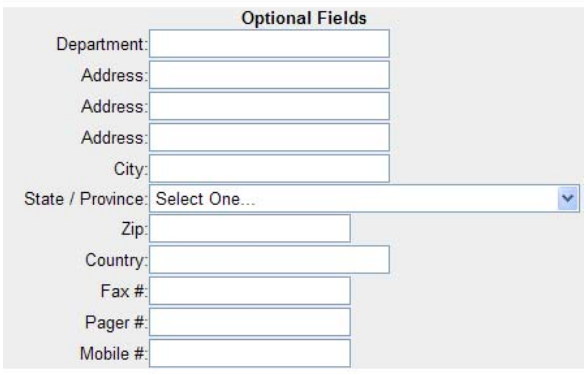
*Shea Test Site - Project Level: Project Team
Back
Search for: Dan
Search
Name
Employer
Business Role
Daniel Anderson Shea Properties Field Operations
Daniel Broome Reed Thomas Co., Inc. General Contractor
Danli Chan Altoon & Porter Architects Architect
Laura D' Andrea Shea Homes Administrative Assistant
Dan DeLange Martin/Martin Civil Engineer
Dan Fitzwilliam TY Lin International Consultant
Daniel Gould Sage Design Group Landscape Architect
Dan Heinfeld LPA Company President
Daniel Heras Altoon & Porter Architects Architectural Team
Daniel Hoon HRP Studio Landscape Architect
Taylor Jordan RBF Consulting CADD/Engineer
Dan King Huitt-Zollars, Inc Civil Engineer
Dang Mai Carter Burgess Architects Architectural Team
Dan Menghini Shea Properties Construction PM
New Team Members
Dan Menghini
Remove
Allow login to project
Cancel
Continue

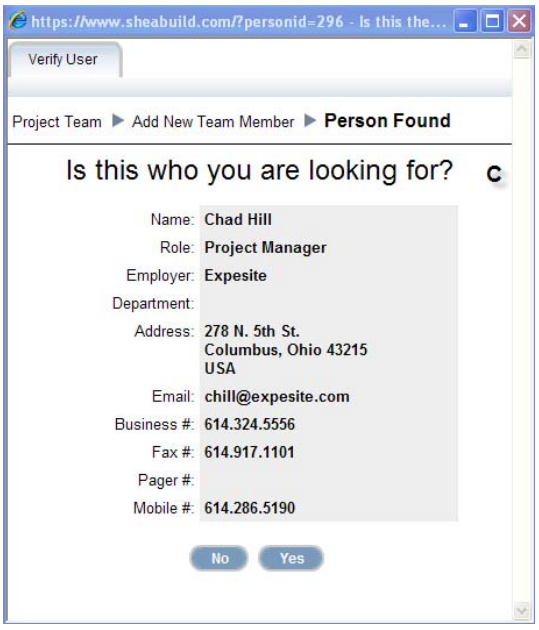
Adding a New User to SheaBuild

4.) If the person does not show up in the list you would click on “Add New User”.



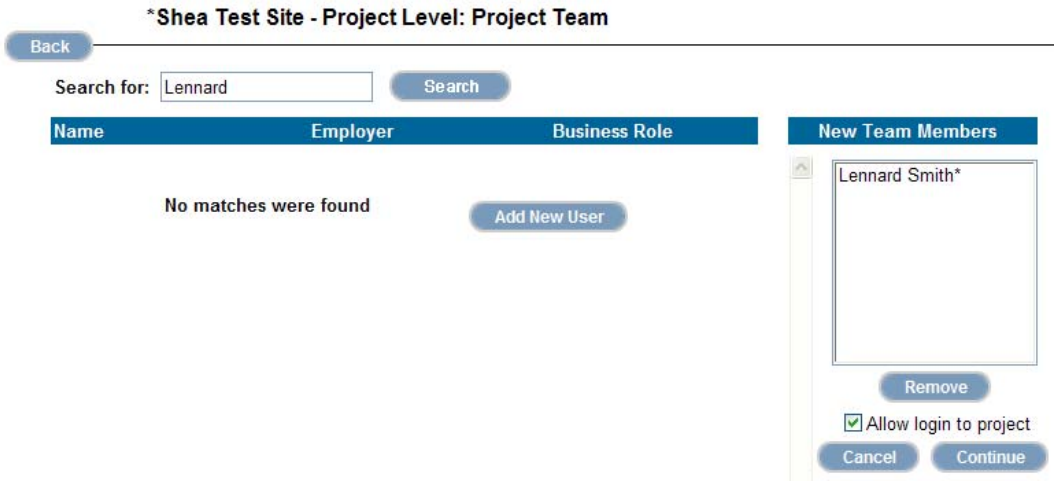
5.) Add the New User contact information and then click Continue.
Is this who you are looking for? window will appear if you try and enter information for a user that has already been created in SheaBuild. Click yes to have user added to New Team Member List.



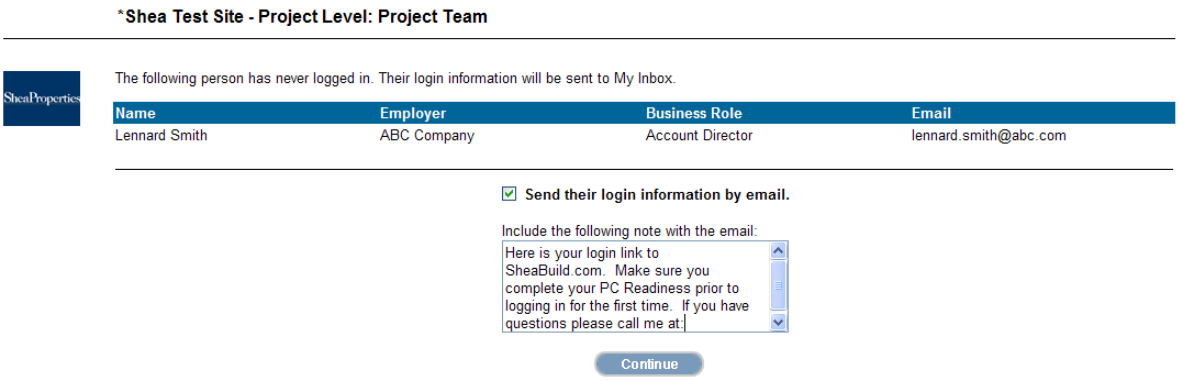


Adding a New User to SheaBuild

6.) Click Continue when you have the correct group of users in the 'New Team Area' and are ready to move to the next step.



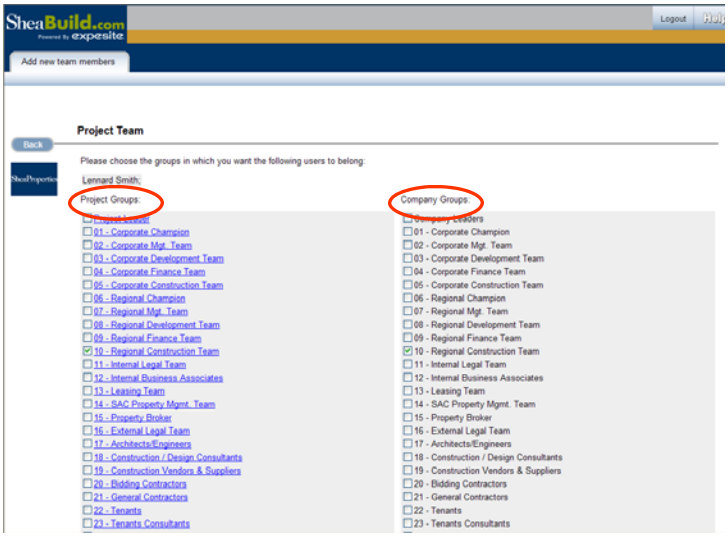
7.) If adding a New User you will be taken directly to the 'Add to More Project' screen shown on the next page. Only New Users will be sent usernames and passwords or be assigned security.
Along with the link you will send the User from SheaBuild.com you will also want to send via a separate e-mail the PC Readiness attachment and the User Manual.


*Shea Test Site - Project Level: Project Team
The following person has never logged in. Their login information will be sent to My Inbox.
Name
Employer
Business Role
Email
Lennard Smith
ABC Company
Account Director
lennard.smith@abc.com
Send their login information by email.
Include the following note with the email:
Here is your login link to SheaBuild.com. Make sure you complete your PC Readiness prior to logging in for the first time. If you have questions please call me at:
Continue

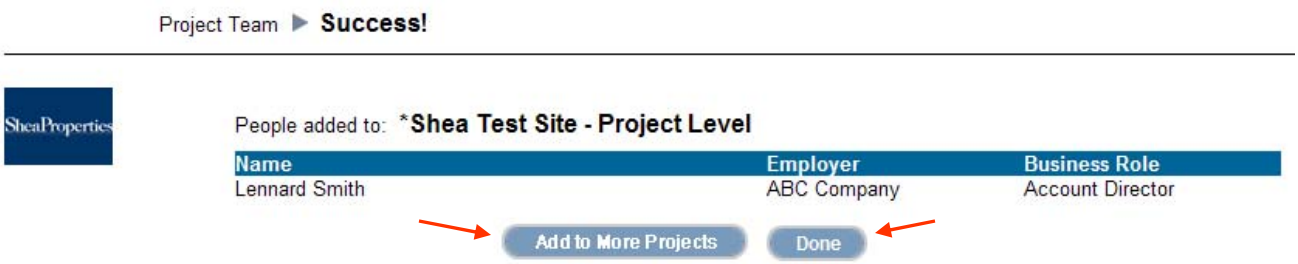
Adding a New User to SheaBuild

8.) Project Groups control what a person can see / do on this project. If Project Groups are role based, you should only have to select one group to give the user necessary project access.

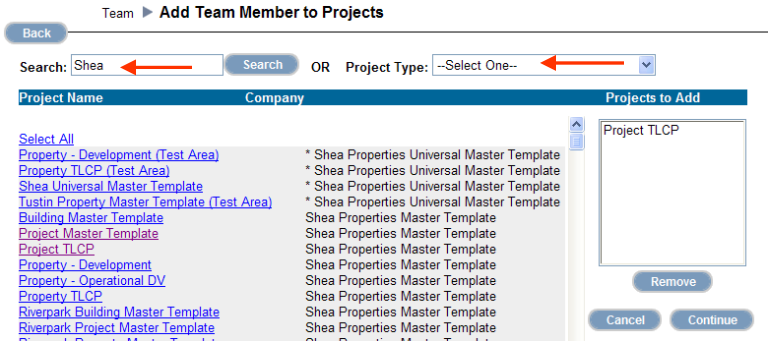
Company Groups control what a person can see / do for this company. If you do not provide a user with company access, they will NOT have access to project reports. Click Continue.

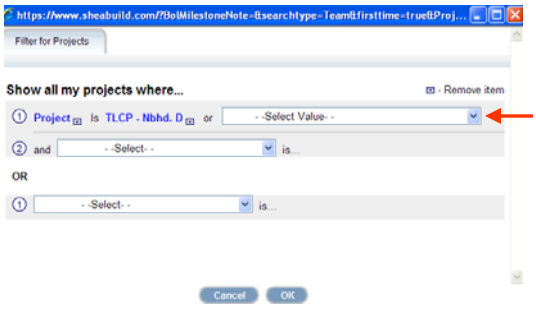

SheaBuild.com
Logout
Add new team members
Project Team
Back
Please choose the groups in which you want the following users to belong:
Lennard Smith:
Project Groups:
Company Groups:
01 - Corporate Champion
02 - Corporate Mgt. Team
03 - Corporate Development Team
04 - Corporate Finance Team
05 - Corporate Construction Team
06 - Regional Champion
07 - Regional Mgt. Team
08 - Regional Development Team
09 - Regional Finance Team
10 - Regional Construction Team
11 - Internal Legal Team
12 - Internal Business Associates
13 - Leasing Team
14 - SAC Property Mgmt. Team
15 - Property Broker
16 - External Legal Team
17 - Architects/Engineers
18 - Construction / Design Consultants
19 - Construction Vendors & Suppliers
20 - Bidding Contractors
21 - General Contractors
22 - Tenants
23 - Tenants Consultants

9.) Click Done to be taken back to the Team List. Click Add to More Projects to add this person (or people) to additional projects.

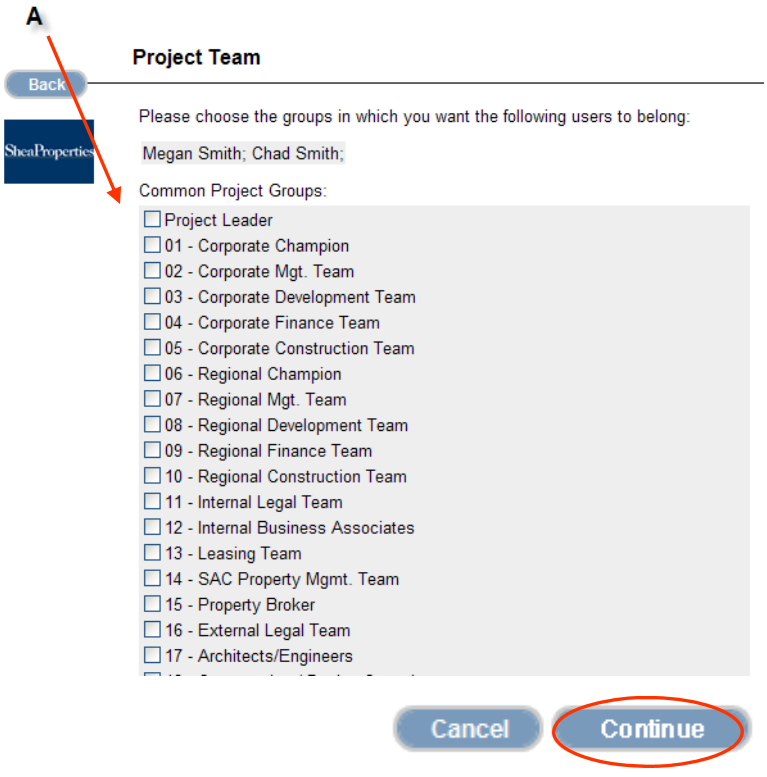


Adding a New User to SheaBuild


Team ▶ Add Team Member to Projects
Back
Search: Shea
Search
OR
Project Type: --Select One--
Project Name
Company
Projects to Add
Select All
Property - Development (Test Area) * Shea Properties Universal Master Template
Property TLCP (Test Area) * Shea Properties Universal Master Template
Shea Universal Master Template * Shea Properties Universal Master Template
Tustin Property Master Template (Test Area) * Shea Properties Universal Master Template
Building Master Template Shea Properties Master Template
Project Master Template Shea Properties Master Template
Project TLCP Shea Properties Master Template
Property - Development Shea Properties Master Template
Property - Operational DV Shea Properties Master Template
Property TLCP Shea Properties Master Template
Riverpark Building Master Template Shea Properties Master Template
Riverpark Project Master Template Shea Properties Master Template
Project TLCP
Remove
Cancel
Continue



10.) Basic search consists of searching for additional projects to add users to by name of project. You can also search by the project type filter. Using the drop down box, select the project type (under the blue company name) that you are looking for. In the screen that appears, you can limit the projects returned in your search by filtering by project information or just click 'Ok' to return to projects you have access to for the chosen project type. Click on project name to place it on the 'Projects to Add' list on the right. Click Continue when you are ready to move on to the next step.


A
Project Team
Back
Please choose the groups in which you want the following users to belong:
Megan Smith; Chad Smith;
Common Project Groups:
Project Leader
01 - Corporate Champion
02 - Corporate Mgt. Team
03 - Corporate Development Team
04 - Corporate Finance Team
05 - Corporate Construction Team
06 - Regional Champion
07 - Regional Mgt. Team
08 - Regional Development Team
09 - Regional Finance Team
10 - Regional Construction Team
11 - Internal Legal Team
12 - Internal Business Associates
13 - Leasing Team
14 - SAC Property Mgmt. Team
15 - Property Broker
16 - External Legal Team
17 - Architects/Engineers
Cancel
Continue

11.) Select a Project Security group for the users to be added to on the additional projects. You will not have to select any Company Security unless you have selected to add users to projects under another Company. Company Security only needs to be set for a user once.

Click Continue to return to the Project Team List.

Complete.

Adding a Shortcut to Your DashBoard

1.) You can easily add a shortcut to your Dashboard for different levels within SheaBuild and reports, etc… Whenever you see the Shortcut Icon a shortcut can be made to your Dashboard. This icon looks like a small clock with a memo behind it. Please see below. While in reports you will see some thing a little different. It will say "Add to Dashboard". Click on the Shortcut Icon or "Add to Dashboard" and you will receive a message that a Shortcut has been added.